DUKE UNIVERSITY
Nonprofit Management Intensive Track Program, ID#: 2025-003
Sponsor: Vail Centre (Vail, Colorado)
Jun 17-22, 2018

Classes are designed to give nonprofit professionals skills and expertise needed to succeed. Instructors are established practitioners and scholars from a variety of disciplines. Participants complete the requirement for the Certificate in Nonprofit Management in six days with classroom & pre-work assignments. To receive the Certificate, students are required to attend classes as scheduled. Class sessions are held Sun through Fri (Jun 25 through Jun 30). Up to thirty-four students are accepted.

Program Locations: Vail, CO
Mon-Fri: Grandview Room, 395 East Lionshead Circle

<u>Sunday, June 17</u>

6pm Session One: “***Welcome and Orientation***”
Nancy J. Love, MPA, Director, Duke University Nonprofit Management Program
Matthew T.A. Nash, MBA, Managing Director, Social Entrepreneurship, Duke Innovation & Entrepreneurship Initiative

Following a welcome by Nancy Love and Matthew Nash, introductions, and an on-boarding activity, we will discuss participants’ expectations for the program and identify norms and standards for our learning community. We will conclude with an overview of the curriculum with special reference to the expectations identified earlier.

<u>Monday, June 18</u>

8:30am Session Two: ***“Nonprofit Leadership”*** **—** Oie Osterkamp, MBA

What does it take to become a nonprofit leader? Start with an examination of personal learning and leadership styles and their effect on decision –making, problem solving, and communication. Each participant will examine these frames and what they suggest about improving leadership capabilities for ourselves and for those we lead.

Key Learning Objectives:

- Use results from the inventory to understand personal learning and leadership style.
- Be able to use each learning leadership style in developing approaches to leadership behaviors, problem solving, decision-making, and communication.

10:30am Mid-Session Break

10:40am Session Two Continues

12 – 1pm Lunch

1pm Session Three: ***"Strategy for Nonprofit Organizations"*** **—** Matthew T. A. Nash, MBA

Participants will examine the strategic plan as an important tool for the nonprofit organization. This course will focus on the basic components of the strategic plan and discuss the planning process utilizing a variety of business practice tools to evaluate the organization and to set a course for increased impact. Tools include the SWOT Analysis, BCG Matrix, Sustainability Matrix, and the Strategy Canvas. This course will provide an opportunity for students to use the tools to begin constructing ideas to incorporate into a strategic plan.

Key Learning Objectives:

- Understand the components of a strategic plan.
- Utilize the analysis tools in a group setting to review an organization.

3pm Mid-Session Break

3:10pm Session Three Continues

5pm Session Ends

5pm – 6pm Mountain Reception – **"*Connect & Reflect*"**

<u>Tuesday, June 19</u>

8:30am Session Four: ***"Nonprofit Leadership"*** **(***continued from previous day)* **-** Oie Osterkamp, MBA

10:30am Mid-Session Break

10:40am Session Four Continues

12 – 1pm Lunch

1pm Session Five: ***"Nonprofit Governance and the Board of Directors"*** - TBA

To be successful, nonprofit organizations require strong leadership from their Board of Directors. The board's responsibility is to oversee the effectiveness of management policies and decisions, including the execution of its strategies. Discuss how you may increase board members commitment to the mission and purpose of your organization, and how boards must be active and engaged to fulfill their legal and governance duties. This course addresses the following: the board's roles 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 a nonprofit's internal and external stakeholders require a fully engaged and active board that oversees the organization.

3:30pm Break

3:40pm Session Six: "***Performance Measurement for Nonprofit Organizations***" – Matthew Nash, MBA

As federal, state, and local dollars become more competitive, telling your board, staff, and funders about your good work takes more than story telling. While the concept of measuring performance is not new, the development of practical ways to implement actual measures is. This session will provide a conceptual framework of performance measurement and participants will learn how to design performance measures through data collection and analysis.

Key Learning Objectives:
- Gain knowledge on the significance of performance measurement for program evaluation.
- Identify who, when, why, and how of program evaluation.
- Discuss the theory of change for designing and measuring program performance.
- Learn strategies on how to design performance measures through data collection and analysis.

5pm – 6pm Mountain Reception – "***Connect and Reflect***"

Wednesday, June 20

8:30pm Session Six: "***Performance Measurement for Nonprofit Organizations" (continued) –***
Matthew Nash, MBA

10:20am Break

10:30am Session Seven: ***"Fundraising Strategy"*** – Ruth Peebles, MPA

Changes in the economic environment require that nonprofit boards and staff approach their work differently in order to build capacity and ensure sustainability. This interactive course will provide participants with the most effective "best practices" that ensure greater fundraising success and sustainability. Key solicitation strategies to reach specific audiences and techniques to increase board participation in fundraising will be shared. Participants will apply creative fundraising principles and strategies based on current trends relevant to their own organizations.

Key Learning Objectives:

- Integrate new trends in giving/philanthropy in the fundraising efforts.
- Explain the board's role in fundraising and how to increase board engagement.
- Implement innovative fundraising strategies for securing funds.

12pm – 1pm Lunch

1pm Session Seven Continues

2:30pm Session Eight: "***"Grant Writing Management and Compliance""*** – Ruth Peebles, MPA

This course will guide participants through the grants management process -- from the preparation of a grant proposal to fiscal report preparation. Focus on the important elements of a grant proposal -- including the cover letter, executive summary, need statement, goals, objectives, methodology, evaluation, the budget and future funding. Discuss how to build relationships with funders and the typical questions funders ask when considering a proposal and the criteria used. Topics include: project implementation, monitoring and reporting requirements, and fiscal management & accountability. Practical tips for ensuring compliance and improving chances of future success will be presented.

Key Learning Objectives:

- Understand the essential components of a grant proposal package.
- Determine the most effective writing strategies and styles for various grant applications.
- Evaluate and access grant proposals after reviewing and critiquing a well-written proposal.
- Create a system for compliance management – report on a grant's progress and impact.
- Organize for the receipt and management of funds.

3:30pm Mid-Session Break

3:40pm Session Eight Continues

5pm – 6pm Mountain Reception – **"*Connect and Reflect*"**

Thursday, June 21

8:30am Session Nine: ***"Nonprofit Financial Management"* -** Melissa LeRoy

Understand financial management for nonprofits. Focus on topics integral to nonprofit fiscal management. Learn financial 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. Gain an understanding of financial statements, budgeting, and how to survive 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.

10:30am Mid-Session Break

10:40am Session Nine Continues

12 – 1pm Lunch

1pm Session Nine Continues

3:20pm Break

3:30pm Session Ten: ***"Introduction to Social Entrepreneurship"*** – Matthew Nash, MBA

Nonprofits, universities, the media, and even the White House seem to be increasingly using the term, "social Entrepreneurial ship," but what does it really mean? History is full of examples of private citizens establishing Innovative organizations and programs to serve social purposes. In recent years, these social entrepreneurs have exhibited an increased willingness to look beyond the traditional philanthropic and charitable approaches in order to find more effective and sustainable solutions to social problems. They are adopting and adapting many tools from the world of business, blurring the lines between the business and nonprofit sectors.

We will explore concepts and frameworks for understanding and practicing effective social entrepreneurship and instilling a culture of innovation within your nonprofit, emphasizing the importance of systems thinking, cross sector collaboration, and creative engagement.

Key Learning Objectives:

- Define the concepts of social entrepreneurship, social enterprise, and social innovation, and be familiar with various forms of innovation in the social sector.
- Define and demonstrate understanding of social entrepreneurship as a promising (though still emerging) set of methods, tools, theories, and principles - with strengths and limitations – for achieving significant, lasting social change in a variety of domains and across sectors.
- Differentiate between social entrepreneurship and the related concepts of "social innovation" and social enterprise.
- Identify key competencies of successful social entrepreneurs and describe the fundamental steps in the "process" of social entrepreneurship.

5pm-6pm Mountain Retreat – **"*Connect and Reflect*"**

Friday, June 22

8:30am Session Ten continues – Matt Nash, MBA

10:50am – 11am Break

11am ***Final Session***
Matthew T.A. Nash, MBA, Managing Director

Social Entrepreneurship, Duke Innovation & Entrepreneurship Initiative

In this session, we will bring closure to the Duke Nonprofit Management Intensive Track program by reviewing and discussing the key themes of the week. We will also share the revised personal development goals and actions plans that each participant will commit to pursuing in the months ahead. The Duke Certificate in Nonprofit Management will be awarded.

12pm-1pm Lunch

1pm-2pm Duke Certificate in Nonprofit Management -- Award Ceremony & Closing

GENERAL INFORMATION

Registration

The Nonprofit Management Intensive Track Program will be held at the Vail Centre Jun 25-Jun 30, 2017. You may register through the Vail Centre, online, or by telephone (contact info below). Ask for Course ID#: 2025-003.

Online: Register for Course ID#:2025-003. Click here: https://www.vailcentre.org/duke-npm-reg/

Direct link: https://www.vailcentre.org/programs/duke-nonprofit-management-2/

Phone: 720-288-1206, Todd Wallis, Vail Centre, COO Email: todd@vailcentre.org

Mail: Send a check or money order, and our printed registration form. Record the Course ID#, 2025-003, title, and fee for the course in which you would like to be enrolled. Mail to:
Vail Centre
Attention: Todd Wallis, COO
P.O. Box 100

Program Date/Schedule

(Sun, Jun 17, 2018 *through* Fri, Jun 22, 2018): Each class starts at 8:30am and ends at 6pm (except on Friday). On Fri, Jun 30, class starts at 8:30am and ends at 2pm**.** The day includes breakfast, two sessions of coursework, interactive breakouts, lunch, and a Mountain Reception from 5pm – 6pm on Mon, Wed, & Thur. There is a *Welcome and Orientation* for the program on Sun, Jun 25 at 6pm. Students are encouraged to attend.

Attendance Policy

To receive the Duke Certificate in Nonprofit Management on day six of the Program (Fri, Jun 22, 2018), participants are expected to be on time for class and participate.

Program and Hospitality Logistics

After students register for the Nonprofit Management Intensive Track Program, detailed program and hospitality logistics will be sent to student via email by Todd Wallis, COO, Vail Centre.

Pre-Work

The NPM Intensive Track program requires pre-work. Assignments are sent to registered students within one (1) month of the program start date.

Program Cancellation

$200 of your fee is nonrefundable. Refunds allowed, minus a $200 administrative charge, if request is received in writing by the end of day on Apr 30, 2018. To submit a cancellation, send an email to learnmore@duke.edu. No refunds after May 1, 2018.

Dress Code

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

Nonprofit Management Program / 919-668-6742 / 919-681-1025 / 919-668-6743
Sponsor: Vail Centre, Todd Wallis, COO, 720-288-1206