**CURRICULUM, LEARNING OBJECTIVES &**
**PRESENTER BIOGRAPHIES**

## Class I: March 7 & 8, 2024

### Maximize Your Team's Potential

*TBD*

Session Description

Spend a day imagining how best to work with your team. In this workshop, you will be offered the Myers-Briggs Type Instrument to learn about how YOU work on a team along with resources about team formation and dynamics. The workshop will be engaging, interactive, and instructional. You will leave with practical tools to help you at your organization.

Learning Objectives

- Understand one's leadership style – especially how one fits on a team
- Learn how different personality styles best contribute to a team
- Review how teams form and explore the dynamics of team development
- Maximize the effectiveness of each team member

### Time Management

*Mark Slaughter, Associate Executive Director, ResCare, Inc.*

Session Description

2-hour block of instruction on personal time management, and group project management. The focus will be on effective tools used for personal time management and leadership strategies used to manage groups of professionals.

Learning Objectives

- Understand the foundation of time management and why this fails in the modern world
- Tools and techniques used for personal time management with personal activity used to demonstrate and coach participants
- Cover keys to Successful group project management and discuss best practices and principles.
- Utilize fun group activities to demonstrate and coach participants on skills and techniques covered

### Servant Leadership: Seeking New Ground

*Phillip Anderson, Founder/Chief ReThinker, ReThink Consulting*

Session Description

Leadership development is not an event. It is a journey and requires constant attention. Leadership is expressed in our relationships, some deep and some collegial. Relationships in and over time change because we and they are constantly evolving - situations, events, challenges, and opportunities. Leadership is also expressed in individual encounters and brief moments of interaction. How do we respond? We will explore servant leadership's timeless philosophy, principles, and practices. We will also examine the role of humility, vulnerability, courage, and gratitude in our journey. Where you start and what path you choose really does matter.

**Servant Leadership: Seeking New Ground (cont)**

Learning Objectives

- Learning that true strength comes from humility, vulnerability, courage, and gratitude
- Servant Leadership is a philosophy – a way of being that leads to a way of doing
- Understanding the foundational principles of leadership – Trust, Awareness, Community, Empathy, and Paradox
- Practicing, Knowing, Growing, and Showing to serve first, lead later

**Class II: April 4 & 5, 2024**

**Using Data to Drive Decisions**

*Doug Beebe, President/CEO, Benchmark Human Services*

Session Description

In an industry that faces intense regulatory pressure, shifts in both the funding mechanisms and consumer choice are forcing leaders to make crucial decisions that directly impact the future of their organizations. Historically, the focus on data has been in response to regulatory requirements, and it has driven organizations to record massive amounts of details but has resulted in very little information useful for decision-making. In this context, it is crucial for leaders to be able to understand and use both industry data and program-specific data to guide these decisions. Equally important is the ability to distill that data into understandable information to present to Boards, staff, and families as program decisions are made and implemented, often with direct impact and risk to organizations.

Learning Objectives

- Using an actual but blinded example, the presentation will walk participants through the process from the development of the strategy through the analysis of potential projects to the implementation
- Finding, understanding, and using Industry data, as well as data from related areas
- Putting the data into current strategies (or perhaps rethinking those strategies)
- Identifying the right questions you know what you don't know?
- Identifying consistent data sources or sources of "truth"
- Data analysis with simple, Excel-based tools; data presentation techniques
- Discussion of what data to give to what audience and how to do that
- Moving from data to action
- Group discussions/brainstorming on outcomes data and management systems

**The Anatomy of Strategy**

*Mike Stone, Consultant, Stone Consulting, LLC*

Session Description

Traditional modes of strategic planning tend to emphasize planning over strategy, meaning that the why is often lost because of the emphasis on the how. In the current environment, the nonprofit strategy requires equal doses of focus and flexibility. To this end, the nonprofit strategy must be anchored in a clear understanding of the core elements of the organization – the why. In this session, we will examine the entire anatomy of strategy and learn how to align the various parts into a framework that can be used to guide future program and resource decisions.

Learning Objectives

- Learn the purpose of each aspect of a comprehensive organizational strategy
- Learn how to align the aspects of the strategy into a cohesive framework
- Learn how to utilize the framework as a tool for decision-making

**Stakeholder Engagement for Today's Leaders**

*Leigh Ann M. Jacobson, CFRE, Founder & Principal Consultant, Jacobson Group Consulting*
*Marv LeRoy, President & Founder, Institute for Philanthropic Excellence*

Session Description

Stakeholder engagement is a core competency of a successful leader. This interactive presentation increases understanding of practical approaches that can facilitate greater stakeholder engagement to improve financial sustainability, stakeholder relationships, increased philanthropic efforts, organization reputation, and brand. Good leadership is rooted in the ability to sustain and grow the engagement of people to accomplish something extraordinary together.

Learning Objectives

- Summary of Stakeholder Engagement
- Review the 7 Stages in a Meaningful Stakeholder Engagement
- Learn How Engagement Strategies Impact Financial Sustainability and Shared Commitment
- Discuss How Storytelling Boosts Engagement Metrics (Exercise: Sharing Your Philanthropy Narrative)

**Public Policy Advocacy: Why it's Important and Why You Need to Engage**

*Kim Dodson, CEO, The Arc of Indiana*

Session Description

Your leadership in public policy advocacy is critical. This session will provide an overview of Indiana's political landscape at the federal, state, and local levels. We will talk through effective advocacy efforts and engage your entire team in the policy advocacy process. All politics is local, and you are the local community provider that your elected officials need to know to understand the important work that you do.

Learning Objectives

- You will walk away with a clear understanding of the legislative process at the federal, state, and local levels
- You will learn to tell your agency's story in a way that elected officials and other policymakers will remember and want to champion
- You will learn effective ways to engage your board, staff, and clients in building relationships that lead to policy advocacy success

**Class III: May 2 & 3, 2024**

**The Ins and Outs of Nonprofit Board Governance**

*Scott Bova, President & CEO, Triangle Education Foundation*

Session Description

Emerging leaders are likely to transition from presenting and interacting within an organizational management structure to presenting and interacting with a Board of Directors' governance body. This session will focus on understanding the distinction between management and governance as it relates to nonprofit corporations. Participants will learn about Corporate Committees, the legal obligations of the board, the roles of the CEO, staff, board, and chair, and how they interact with each other. Best practices will be reviewed on topics such as meetings, recruitment, orientation, and effective management/governance.

Learning Objectives

The Governance presentations will provide participants with a high level of understanding of Board responsibilities including:

- The difference between Governance vs. Management and how that impacts the staff and the board
- Selecting & evaluating the CEO
- Strategic planning roles and responsibilities
- Financial planning and budgeting
- Ensuring legal and ethical integrity

**The Ins and Outs of Nonprofit Board Governance (cont.)**

- Best practices for board governance such as:
  - Recruitment & DEI
  - Orientation & Training
  - Self-Evaluation
  - Committees
  - Meetings
  - Technology
- Laws and Guidelines Governing Boards
- Role of Articles of Incorporation, Bylaws, and policies

**Connecting with Your Audience**

*Christy Frazier Shepard, Operating Partner, Planning Plus, LLC*

Session Description

***WARNING:*** *Participation in this session will lead to confidence in presentation skills and new ideas to quickly connect with a variety of audience members!* In any presentation scenario, a key purpose is to quickly connect with your audience and get your message across – all while keeping the interest of a variety of stakeholders. Whether you are sharing factual information, gaining input into solution strategies, or influencing others for purposeful action, you often have little time to connect with your audience and gain their interest in your topic. This session will focus on identifying your preferred communication style and how you like to give and receive information. You will also learn how to identify preferred styles of communication for your audience and how to craft a presentation to meet your intended objectives. The skills learned in this session can apply to large presentations, small group meetings, or one on one interactions. Prior to this session, we will ask participants to identify a future presentation they will be required to make, and included in this interactive session will be a practice exercise.

Learning Objectives

- Identify your inherent communication style and presentation style
- Identify various communication styles of audience members and how to connect with and keep the attention of a variety of audience members at one time
- What materials are meaningful to distribute, when to provide participants with supplemental material
- Keys to audience engagement and participation
- Physical space and how to keep the audience focused on the topic vs. the speaker

Design your own “Presentation Tool Kit” and craft your tool kit essentials such as presentation objectives, outline and format, timing, and presentation logistics

**Managing a Positive Work Environment**

*Tom Speaks, Principal/Co-Founder, The Impact Group*
*Greg Laforme, FAIDD, Special Consultant, The Impact Group*

Session Description

Agencies serving individuals with developmental disabilities remain faced with significant challenges in recruiting and retaining a new generation of staff. National turnover rates range from 40% to 70% making service continuity and quality of service difficult at best. Add the ongoing pandemic and we face a “crisis of service”! Creating and managing a positive work environment along with quality supervisors and managers can go a long way to remediating the challenges faced. This presentation discusses several basic “positives” to use in constructing and maintaining a positive work environment.

Learning Objectives

- Participants will identify at least five (5) specific management skills to use immediately
- Participants will identify at least three (3) management behaviors “no, nos!”
- Participants will identify three (3) values of a positive work environment
- Participants will identify three (3) values of using a positive action monitoring tool

**Managing a Positive Work Environment (cont.)**

- Participants will identify five (5) concepts of a culture of appreciation
- Participants will identify three (3) positive actions to use in their agencies immediately

**Crisis Communications**

*Tom Speaks, Principal/Co-Founder, The Impact Group*
*Greg Laforme, FAIDD, Special Consultant, The Impact Group*

Session Description

Agencies in the field of developmental disabilities are exceptionally vulnerable to unexpected and unplanned spurious attacks on their reputations and services. Whether from disenchanted staff, parents/guardians, or from unexpected events, e.g., natural disasters, accidents, staff misconduct, etc., assaults on your reputation call for proactive, positive, and professional responses. If you are NOT PREPARED, your Agency's reputation and very existence may be threatened. This presentation discusses Crisis Communications, provides practical prevention tactics, and discusses how to deal with an actual Crisis and how to prepare for a Crisis event. Also discussed will be how to promote HEALING and POSITIVE PUBLIC RELATIONS following a Crisis event.

Learning Objectives

- Participants will learn three (3) specific communication skills to use in a crisis scenario or when dealing with reporters
- Participants will learn how to construct an "OREO" communication "cookie" and will behaviorally demonstrate that learning to the participant group
- Participants will learn the critical policies, procedures, and preparations necessary to prepare for a Crisis Situation and the resulting communication needs

**<u>Class IV: June 6 & 7, 2024</u>**

**Employment Law Basics: Foundation for Supervisor Success**

*Robert Markette, Attorney, Hall Render, Killian, Heath & Lyman, P.C.*

Session Description

This session will arm participants with the nuts and bolts of Supervisor Success when it comes to leading and managing your team through an interactive presentation and small group exercises. The example-filled presentation, along with an explanation of relevant laws, will help supervisors learn best practices for dealing with a variety of employee issues and provide tools to ensure you are responding appropriately.

Learning Objectives

Participants will learn the importance of having policies and procedures and best practices for:

- Hiring decisions
- Performance evaluations
- Promotion/demotion
- Discipline/termination
- Social Media in the workplace
- Rights for Protected Classes

**Multi-Operational Management Strategies**

*Jason McManus, CEO, Wabash Center, Inc.*

Session Description

Organizations supporting people with disabilities and their families often operate multiple service lines, sometimes across county and regional (and State) lines. With multiple funding streams, service ratios, and regulatory rules, delivering high-quality, consistent programming can be difficult. Employees can find themselves tasked with multiple, competing priorities. Managing in this environment poses unique challenges. Participants will learn skills that are vital to navigating in a multi-operational environment. Through the use of case scenarios, activities, and group discussions, participants will learn strategies applicable to their work environment.

**Multi-Operational Management Strategies (cont.)**

Learning Objectives

- Understanding the importance of organizational culture
- Develop clear cross-organizational communication
- Identify best practices in management and leadership

**Finances**

*Mark Flegge, CFO, Benchmark Human Services*

Session Description

The emerging leader needs to have an understanding of fiscal operations in order to maximize the total impact of the organization they serve. Participants will learn the use and function of the income statement, the balance sheet, the statement of cash flows, and the operating budget. The participant will gain a better understanding of their organization's current financial status and learn to look for and evaluate future opportunities.

Learning Objectives

- Read an Income statement for a better understanding of operational performance
- Gain a basic understanding of the balance sheet and statement of cash flows
- Learn and apply significant operating and financial ratios
- Create an operating budget
- Evaluating financial statements for future opportunities

**Self-Care: The Mission, the WHY, & the Pursuit of Happiness**

*Kelly Hartman, Vice President of Community Solutions, insights/ViaQuest Community Solutions*

Session Description

Participants will learn the value of "Self-Care." Surround yourself with like-minded individuals who can offer advice, share opportunities, and help you meet your work and life goals.

Learning Objectives

- Benefits of a support system
- Identifying and reaching out to potential support system members, mentors, coaches, friends, peers
- Maintaining the support system; staying in touch; practicing equity in relationships; showing appreciation
- Techniques and strategies to avoid "burnout" and "flame out" for leaders

**PRESENTER BIOGRAPHIES**

***Phillip Anderson, Founder/Chief ReThinker, ReThink Consulting***

Much of today's business involves working in teams and groups of people. We pursue innovation by "thinking outside the box." But, then we step back inside the box to do our work and it's frustrating. At ReThink! Consulting, we focus on getting outside the box and doing outside the box. After more than 25 years serving as the chief staff officer for non-profit organizations, Phillip Anderson founded ReThink Consulting in 2008. His goal - to use his experience and expertise as a teacher, trainer, teller, and connector, to help your community or organization rethink the questions we ask, create conversations that matter, and discover innovative solutions.

***Doug Beebe, President/CEO, Benchmark Human Services***

Doug Beebe became a Benchmark Vice President in 2013. In 2015, he was named President of Residential Services, overseeing all of the company's residential programs, as well as employment services. On July 1, 2017, Beebe became CEO of Benchmark. Prior to joining Benchmark, Beebe was Chief Executive Officer of Community Rehabilitation Hospital in Indianapolis. He has also served as Director of the Bureau of Aging and In-home Services for the State of Indiana; Program Director and Executive Director of Hook Rehabilitation Center-Community Hospital in East Indianapolis, and State Administrator for Res-Care, in Illinois and Indiana.

***Scott Bova, President & CEO, Triangle Education Foundation***

Scott E. Bova, CFRE currently serves as the President & CEO of the Triangle Education Foundation. Scott joined the Foundation in June of 2000. Under Bova's leadership Triangle has seen a 1300% growth in its endowment. In addition, the annual fund income and average gift has increased 350% during his tenure. As a result of this success, the Foundation has been able to increase its educational support by over 55%. Previously, Bova served as the Chief Operating Officer of the Phi Kappa Theta National Foundation, where he joined the staff in 1995. In addition to full-time leadership for close to 30 years in the nonprofit space, Bova is a sought-after presenter and consultant on board governance, fundraising, nonprofit marketing & communications and alumni engagement. Bova received a bachelor's degree from Ohio University. He earned his Certified Fund-Raising Executive (CFRE) designation in the fall of 2002. In 2012, Bova successfully earned a Certificate in Non-Profit Leadership from Duke University.

***Kim Dodson, CEO, The Arc of Indiana***

Kim Dodson was appointed to serve as CEO of The Arc of Indiana in July 2015. Kim first joined The Arc of Indiana in 1998 as Director of Government Relations and moved into the role of Associate Executive Director in 2006. Kim has 25 years of work experience in the field of public policy and government affairs. She has worked for a United States Congressman, the Indiana House of Representatives, and the Indiana Chamber of Commerce and as a contract lobbyist with a local law firm. Kim graduated from Purdue with degrees in political science, literature, and management.

***Mark Flegge, CFO, Benchmark Human Resources***

Mark Flegge became the CFO of Benchmark Human Services in 2001. For the past twenty-two years, he has directed the accounting, finance, payroll, and IT functions for the organization. Prior to joining Benchmark, Mark gained financial experience in public accounting, manufacturing and the non-profit sector. Mark is passionate about helping managers with non-financial backgrounds learn and grow in their understanding of the financial aspects of their organizations.

***Kelly Hartman, Vice President of Community Solutions, insights/ViaQuest Community Solutions***

Kelly is the Vice President at insights/ViaQuest Community Solutions, a company named to the Top Workplaces in Indianapolis for ten years, Co-Founder of Outside the Box – a day program known for its innovation and has served the Indiana Association of Behavioral Consultants since its inception in 2001. In her 30+ year career of supporting individuals with intellectual and developmental disabilities -- she has always maintained a focus on individual's capabilities, not their disabilities. In her passion to help people achieve better outcomes in life – she believes in building on what a person CAN do

***Kelly Hartman (cont.)***

through teaching a non-aversive, person-centered approach personal success. Through her very "real" training style, Hartman is best known for her sense of humor and helping us see things from a different perspective.

***Leigh Ann M. Jacobson, CFRE, Founder & Principal Consultant, Jacobson Group Consulting***

Leigh Ann Jacobson is a nonprofit industry expert with a fundamental understanding of the intersection of fundraising, engagement, strategic marketing, and communications. She is a Certified Fund Raising Executive (CFRE) with over 20 years of progressively responsible fund development experience. As a practitioner, Leigh Ann is an accomplished fundraising executive with a track record of securing seven-figure principal gifts. As a national speaker and consultant, Leigh Ann is a passionate and articulate communicator with extensive experience providing clients with capacity-building training and education. A graduate of King's College and Arcadia University, Leigh Ann also holds a Certificate in Executive Management and an Office of Continuous Improvement (OCI) Lean Six Sigma Yellow Belt from the University of Notre Dame. Today, Leigh Ann manages the direction and growth of her firm. She has a true love of philanthropy and a belief that philanthropy and nonprofits can truly change the world for the better. This is reflected in how she conducts her work and lives her life.

***Dr. Greg Laforme, FAIDD, Special Consultant, The Impact Group***

Dr. Greg LaForme, FAIDD, has over 40 years of experience in the field of developmental disabilities. As a graduate of the University of Wisconsin and a Fellow in the American Association on Intellectual and Developmental Disabilities, he has served as a Private Service Provider, a Public Service Administrator in the field, and a Senior Instructor at the University of Akron.

***Marv LeRoy, President & Founder, Institute for Philanthropic Excellence***

Marv has committed his entire 39-year career to leading not-for-profit organizations in professional, volunteer, and consultant capacities. He has helped to advance the missions of dozens of entities in the education, health, human services, and arts and culture arenas, and has assisted with the raising of more than $500 million for wonderful causes. He is also an adjunct professor in the Institute for Higher Education Leadership at the College of St. Rose and regularly presents at conferences and workshops in the areas of nonprofit management, fundraising, strategic planning, and legislative affairs. In addition to his degrees from Siena College (BA, Political Science) and Sage Graduate School (MPA), Marv has also earned a graduate certificate in Fund Raising Management from Indiana University's Lilly School of Philanthropy and an executive certificate in Nonprofit Leadership from the University of Notre Dame's Mendoza College of Business. His decision to create the Institute is grounded in his strong commitment to the nonprofit community, as well as his belief that far too many organizations in the third sector have so much more to offer if resources could be found to expand their missions.

***Robert Markette, Attorney, Hall, Render, Killian, Heath & Lyman, P.C.***

Robert W. Markette, Jr., CHC, focuses his practice on representing home health, hospice, and private duty providers in all aspects of their operations.  He works with clients on issues related to Medicare and Medicaid compliance, payer issues, including appealing payer audit findings; HIPAA compliance; and Medicare and Medicaid fraud and abuse, including matters such as developing and implementing compliance programs, performing internal investigations and representing providers in external investigations and civil and criminal matters.  Robert also assists clients with purchasing and selling home health, hospice, and private duty agencies. Because these providers depend heavily on their staff, Robert also addresses legal issues related to employment matters.  This includes wage and hour compliance, responding to Department of Labor investigations, and litigating wage and hour disputes.  Robert routinely provides guidance to his clients on HR matters, including assisting with preparing personnel manuals, guidance on discipline issues, and similar matters. He also assists clients in responding to EEOC investigations and discrimination lawsuits and similar employment issues. Robert is certified in health care compliance by the Health Care Compliance Board.

***Jason McManus, CEO, Wabash Center, Inc.***

Jason began his career in the industry as a DSP in a group home for sexually maladaptive youth with disabilities. He has spent over two decades in the human services field—overseeing youth programming relating to juvenile justice, serving on the executive team with the Department of Child Services, serving as Chief Operating Officer for a large disability provider in Indianapolis, and the last five years as President and CEO of Wabash Center in Lafayette. Jason, his wife Kelly, and their four children reside in Zionsville.

***Christy Frazier Shepard, Operating Partner, Planning Plus, LLC***

Christy Frazier Shepard is a partner with Planning Plus, LLC. As a skilled professional in organizational leadership, she works with both for-profit and not-for-profit organizations in the areas of leadership development, team building, marketing and fundraising development, and strategic, annual, and operational planning. Christy demonstrates the ability to provide leadership to positively influence and negotiate with a variety of internal and external stakeholder groups working towards common goals with deep impact. With a bachelor's degree from Ball State University in Management and Business Administration, she worked in commercial printing for nearly a decade in the areas of communication and marketing, print design, sales and customer service. Recognizing the opportunity to bring for-profit business models to the non-profit human service world, Christy turned her attention towards working with organizations in the social service industry and was first hired as a Project Manager for Planning Plus LLC and now serves as Operating Partner.

***Mark Slaughter, Associate Executive Director, ResCare, Inc.***

Mark Slaughter brings his 5 years of I/DD experience to his current position as Associate Executive Director in New Albany Indiana leading a team of professionals responsible for approximately 140 clients and 300 staff. Mark holds a BS in Business Management from Sullivan University and Masters in Divinity from Liberty Theological Seminary in Lynchburg, Virginia. His background also includes a military career in the United States Marine Corps and the National Guard serving as an Armor Officer until he was accepted into Seminary where he was Commissioned as a Chaplain and deployed with the Army National Guard. He retired from the Army Reserve with twenty-four years of service on January 1, 2022. Before joining ResCare he was the Suicide Prevention Program Manager for the Kentucky National Guard. He graduated the INARF Leadership Academy - Class of 2021 and shortly after completion, received a promotion to Associate Executive Director.

***Tom Speaks, Principal/Co-Founder, The Impact Group***

Tom Speaks is Principal and Co-founder of The Impact Group. He is recognized as a leader in municipal communications. He has developed and implemented communication strategies to help communities reach their goals. Speaks' background in political science and qualitative and quantitative research techniques provides clients with an in-depth understanding of the audiences they are trying to motivate.

***Mike Stone, Consultant, Stone Consulting, LLC***

Mike Stone started his nonprofit consulting practice in 2010, following 13 years in higher education; Earned a Ph.D. from Michigan State University in Higher Education; recently self-published a book on nonprofit strategy titled, "From the Inside Out: A Nonprofit's Guide to Meaningful Strategy.