

## 2021 COURSE CATALOG

### SESSION ONE

#### BOARD GOVERNANCE TRACK

**Session:** *Nonprofit Governance: Nuts and Bolts*

**Speaker:** Lauren Smith  
*President, Lanier Ford*

**Overview:** This course will review the legal requirements for nonprofit governance and the necessary documents required for effective governance.

#### BUDGET AND FINANCE TRACK

**Session:** *Money Matters*

**Speaker:** Trent Clark  
*Senior Vice President of Commercial Banking, Synovus*  
Erin Moore  
*Commercial Underwriter, Synovus*  
Stewart Whitt  
*Financial Advisor, Bridgeworth Wealth Management*  
Stephen Gunter  
*Financial Advisor, Bridgeworth Wealth Management*

**Overview:** This two-part session will dive into money matters. First, what should a nonprofit look for from a bank for tools/instruments to help it manage money smartly and effectively, what debt instruments make sense, and what security measures should it take both technologically and procedurally? Then, how can a financial planner enhance a nonprofits interactions with donors and then be a better steward of its funds? Can stock donations attract

new donors looking for tax savings? What can other tools like Donor Advised Funds and Qualified Charitable Distributions do to incentivize donors?

#### BUILDING EFFECTIVE TEAMS TRACK

**Session:** *Per My Last Email*

**Speaker:** Shannon Drake  
*CEO, Leadership Greater Huntsville*  
Katelyn Sides Baker  
*Program Director, Leadership Greater Huntsville*  
Taralyn Caudle  
*Program Director, Leadership Greater Huntsville*

**Overview:** Communication is vital to any organization and any relationship. Participants will explore communication styles and preferences for themselves and others. This session will provide tools to appreciate the different priorities, preferences, and values individuals bring to any team. Participants will leave with a better understanding of how to leverage the strengths of each member of a team and how to communicate effectively with everyone.

#### CONNECTING COMMUNITY RESOURCES TRACK

**Session:** *Collaborative Community Solutions for Homelessness*

**Speaker:** Jennifer Geist  
*Executive Director, First Stop*  
Patty Lowe  
*Board Member, First Stop*  
Keith Overholt  
*Executive Director, Downtown Rescue Mission*  
Scott Erwin  
*Community Development, City of Huntsville*  
Missy Hanks  
*Case Manager, The ELM Foundation*

**Overview:** Helping people exit homelessness is a huge task for any community. When agencies work together, share resources, and information, they can find new ways to address old problems. Our panel shares their experience in moving from competition to collaboration as they worked together conduct a homeless audit in Madison County Alabama and what they learned.

#### FUNDRAISING TRACK

**Session:** *The Importance of Retaining First-Time Donors (And How To Do It)*

**Speaker:** Steven Shattuck  
*Chief Engagement Officer, Bloomerang*

**Overview:** In this session, we will make the case for why development professionals should concentrate on acquiring a donor's second gift in order to achieve sustainable funding, high donor retention rates and high donor lifetime values.

#### NONPROFIT 101 TRACK

**Session:** *Laying the Foundation*

**Speaker:** Lisa Mays, JD, CFRE  
*CEO, The Catalyst Center for Business & Entrepreneurship*  
Sandy Edwards, CPA  
*Operations Manager, The Catalyst Center for Business & Entrepreneurship*  
Leigh Christian  
*TechRich Project Manager, The Catalyst Center for Business & Entrepreneurship*  
Holly Brockman  
*Women's Business Center Project Manager, The Catalyst Center for Business & Entrepreneurship*

**Overview:** Learn from The Catalyst, a non-profit with a Seal of Excellence from the Standards of Excellence Institute. Good businesses (and Non-Profits!) are built on solid foundations. Draft your blueprint for success with a strong business plan. Survey the land by researching your market. Break ground by crafting your vision and mission.

#### NONPROFIT 401 TRACK

**Session:** *Taking it to the Next Level*

**Speaker:** Chris Newlin  
CEO, National Children's Advocacy Center  
Karen Mockensturm  
CEO, Fantasy Playhouse Children's Theater & Academy  
Mary Elizabeth Marr  
CEO, Thrive  
Laura Huckabee-Jennings  
CEO, Transcend

**Overview:** Hear from non-profit leaders driving the next phase of their growth and development about the challenges of board development, fundraising and operational planning when you are expanding your reach, building capital campaigns and stepping up your mission. How do your needs change for board members, other advocates? How does fundraising change as you grow? How do you approach major capital campaigns? What operational challenges do you face as you grow and how do you address them?

#### OPERATIONS TRACK

**Session:** *Don't Lose Your Spark!*

**Speaker:** Kristina Minyard  
Owner, HRecruit, LLC.

**Overview:** Engage your board and volunteers at any size! This session will pull on HR Tools and Tactics to help nonprofits engage their board and volunteers to excitedly carry out the mission and vision!

#### PUBLIC RELATIONS TRACK

**Session:** *Crisis Communications Planning 101: How acting now can save you time, money, and stress*

**Speaker:** Amanda Jarrett  
Marketing Director, National Children's Advocacy Center

**Overview:** A tornado, fire violence in the workplace, the arrest of an employee or board member – every organization is vulnerable to a crisis. Creating your response plan now can save you time and stress. This session will walk participants through an actual crisis scenario, do's and don'ts, and crisis plan templates.

#### SESSION TWO

#### BOARD GOVERNANCE TRACK

**Session:** *Boardmanship Training*

**Speaker:** John Allen  
CEO, Huntsville Committee of 100

**Overview:** This course will present the basics of boardmanship. How to serve on a board and the roles and responsibilities of a board member.

#### BUDGET AND FINANCE TRACK

**Session:** *Nonprofits by the Numbers*

**Speaker:** Chuck Brand  
CPA, Brand Blackwell & Co  
Tim Hufford  
CPA, Brand Blackwell & Co

**Overview:** Both new and established nonprofits will benefit from the lessons offered in this two-part session. First, bookkeeping, federal and state tax return filing requirements, payroll vs contractors, and more will be detailed. Then, internal controls, audits and financial reporting, and advanced topics will be discussed.

#### BUILDING EFFECTIVE TEAMS TRACK

**Session:** *Building Inclusive Teams*

**Speaker:** Mary Ila Ward  
Horizon Point Consulting, Inc.

**Overview:** Groups and teams in the workplace are most engaged, productive, and effective in psychologically safe, inclusive environments. Building inclusive teams is a critical skill for leaders and individual contributors alike.

Inclusivity takes place when all team members and organizational leaders take consistent action to both acknowledge and include differences in the workplace. During this session, participants will discuss strategies for building inclusive teams from professional research and personal life experiences. Content will include psychological safety and the encounter group model.

Actionable, behavioral-based tactics to implement these characteristics will be given to all participants.

#### CONNECTING COMMUNITY RESOURCES TRACK

**Session:** *Case Management: Providing supportive services to help clients succeed*

**Speaker:** Harold Cannon  
Assistant to the Director, First Stop  
Tanya Rains  
Executive Director, New Futures, Inc.  
Akeem Davis  
Case Manager, LHC Group, Inc.  
Missy Hanks  
Case Manager, The ELM Foundation  
Dr. Jennie Robinson  
Board Member, The ELM Foundation

**Overview:** Good case management doesn't just happen, and it doesn't happen in isolation. Our panel of experienced social service case workers will share lessons learned as they have worked together to provide ongoing supportive services to people in need and create a community care network to assess clients, track outcomes, and share resources.

#### FUNDRAISING TRACK

**Session:** *Diamonds in the Rough – Finding The Hidden Gems In Your Donor Database*

**Speaker:** Steven Shattuck  
*Chief Engagement Officer, Bloomerang*

**Overview:** In this session, we'll explore prospect research strategies that build deeper, more meaningful relationships with donors. Participants will learn engagement strategies that enhance existing relationships, as well as uncover those with a propensity to give to your organization for the first time.

#### NONPROFIT 101 TRACK

**Session:** *Building a Sound Structure*

**Speaker:** Lisa Mays, JD, CFRE  
*CEO, The Catalyst Center for Business & Entrepreneurship*  
Sandy Edwards, CPA  
*Operations Manager, The Catalyst Center for Business & Entrepreneurship*  
Leigh Christian  
*TechRich Project Manager, The Catalyst Center for Business & Entrepreneurship*  
Holly Brockman  
*Women's Business Center Project Manager, The Catalyst Center for Business & Entrepreneurship*  
Lauren Smith  
*Board Chair, Lanier Ford*

**Overview:** With a solid foundation in place, it is time to frame it out. Frame the right layout by having your team in the right places. Accounting and HR are the supports for

your structure. Add your roof by establishing your Governance, and work with your Board to pass final inspection.

#### NONPROFIT 401 TRACK

**Session:** *How to Sustain It*

**Speaker:** Sarah Savage-Jones  
*CEO, Huntsville Hospital Foundation*  
Dana Gillis  
*Senior Executive, Transcend*

**Overview:** Learn how to transition leadership of a successful and well established nonprofit while sustaining momentum, fundraising and community support. What should a new leader expect? How to select the right next leader? Hear from one CEO who has successfully transitioned into a new organization on how to be the new CEO and establish your team for success.

#### OPERATIONS TRACK

**Session:** *Developing A Culture of Excellence*

**Speaker:** Jermie Howell  
*HR Director, Madison County Commission*

**Overview:** This training will provide HR leaders with a road map to building a culture of excellence through employee engagement with an intentional focus on "getting it right."

#### PUBLIC RELATIONS TRACK

**Session:** *Connecting During a Physically Disconnected Age*

**Speaker:** Dr. Janet McMullen  
*Mass Communication Associate Professor, University of North Alabama*

**Overview:** Digital media – especially social media—offer capabilities to connect that were unimaginable only a decade ago. They offer the ability to communicate with individuals or large groups without limits. Friend lists, dating sites, online classes, church meetings and reunions enable us

to meet and talk and learn. But are these relationships real? This discussion will explore the implications of digital communication.

### SESSION THREE

#### BOARD GOVERNANCE TRACK

**Session:** *A non-profit is only as strong as the Board*

**Speaker:** Kathi Tew  
*Board Chair, Liberty Learning Foundation*

**Overview:** This session will cover the importance of how to choose the "right" Board members for your organizations and will provide the necessary tools and information to move your Board from average to great! This session will also cover how strong Bylaws are vital to the success of not only the Non-profit but also the Board.

#### BUDGET AND FINANCE TRACK

**Session:** *Real Numbers, Real Impact*

**Speaker:** Matt Jones  
*CEO, Rockethatch*

**Overview:** Knowing your numbers helps create a sustainable impact. Learn the right numbers to track in order to enhance your nonprofit from a basic survival plan to a beneficial sustained impact strategy. Rely on analytics and metrics to help your mission outlast its launch.

#### BUILDING EFFECTIVE TEAMS TRACK

**Session:** *Thriving on Change: Leadership & Teambuilding in a Post Pandemic World*

**Speaker:** Jim Owens  
*Principal Consultant, Performance Strategies Group*

**Overview:** The privileges and burdens of leadership have been magnified by ongoing coronavirus pandemic, as well as

increasing the speed of change within organizations. Now, more than ever, leaders and their teams must understand the implications change management, communication, decision-making, talent acquisition, retention, and development, and especially, on the emotional well-being of themselves and others. In this fast paced and humorous presentation, offered as both a keynote topic or in a workshop format, author, speaker, and organizational advisor, Jim Owens will help you learn actionable strategies and tactics for building a more productive team and challenge you to explore how to build and maintain a positive organizational culture.

### CONNECTING COMMUNITY RESOURCES TRACK

**Session:** *Pathway to Sustainability*

**Speaker:** Will Irby  
*President, Cintel, Inc*  
Dr. Jennie Robinson  
*Board Member, The ELM Foundation*  
Elaine Dickson  
*Executive Director (Retired), Christian Job Corps*  
Fran Fluhler  
*Executive Director, Manna House*  
Ann Kvach  
*Program Officer, The Community Foundation of Greater Huntsville*  
Missy Hanks  
*Case Manager, The ELM Foundation*

**Overview:** ELM's Pathway to Sustainability model was created with community input to help individuals move from crisis to stability and eventually to sustainability. It is designed to help boards and staff more intentionally focus their efforts on what they do well. This session will share how the model is being used with clients and what we are learning.

### FUNDRAISING TRACK

**Session:** *Nonprofit Videos (on a Budget) that Engage and Retain Donors*

**Speaker:** Steven Shattuck  
*Chief Engagement Officer, Bloomerang*

**Overview:** This workshop is designed for Executive Directors, Board Members, and non-profit leaders who plan to lead their non-profit organization through a transformation.

### NONPROFIT 101 TRACK

**Session:** *Putting it on the Market*

**Speaker:** Lisa Mays, JD, CFRE  
*CEO, The Catalyst Center for Business & Entrepreneurship*  
Sandy Edwards, CPA  
*Operations Manager, The Catalyst Center for Business & Entrepreneurship*  
Leigh Christian  
*TechRich Project Manager, The Catalyst Center for Business & Entrepreneurship*  
Holly Brockman  
*Women's Business Center Project Manager, The Catalyst Center for Business & Entrepreneurship*

**Overview:** Prepare for your open house. Stage it on a non-profit budget. Secure your financing with a strong Fund Development plan, and utilize DIY tools and resources to reach your target market.

### NONPROFIT 401 TRACK

**Session:** *Back to Basics: Reflecting on Servant Leadership*

**Speaker:** Andrew Jennings  
*CCO, Transcend*  
Gia Giacomoni  
*Executive Coach, Transcend*

**Overview:** In a growing or long-standing non-profit organization, it's important to remember your "why", your reason for existing, and refocus on measuring the impact you have on the community you serve. How do you

realign your resources to the mission and how can you measure your impact? Gain insight into how to address these questions in your nonprofit for your board, staff and volunteers.

### OPERATIONS TRACK

**Session:** *Employee Relations - The Good, the Bad, The Ugly*

**Speaker:** Ramona Burroughs, SPHR, SHRM-CP  
*Director, Employment and Employee Relations, The University of Alabama in Huntsville*

**Overview:** This session will cover 1) strategies to promote positive employee relations, 2) how to assess when corrective action is necessary, and 3) ethical and legal employee disciplinary actions.

### PUBLIC RELATIONS TRACK

**Session:** *Talking to Millennials (How to Earn Their Time & Donations)*

**Speaker:** Sarah Macaluso  
*Director of Client Experience & Strategy, Red Sage Communications, Inc.*

**Overview:** Millennials are often stereotyped as selfish. Don't believe it. Data suggests they are incredibly generous and love supporting causes. In this session, you'll learn how to share your non-profit's unique story with the millennial generation. You'll walk away with strategies on how to attract millennial volunteers and donations, as well as create new "advocates" for your organization's future growth in the process.