



# the outcomes conference

April 17 – 19, 2018 Hyatt Regency Dallas

## learning experiences

- 2 Collaborative Intensive**  
Tuesday, April 17
- 5 Leadership Forums**  
Wednesday, April 18 – Thursday, April 19
- 10 Full-Day Intensive Seminars**  
Wednesday, April 18 – Thursday, April 19
- 15 Workshops**  
Wednesday, April 18 – Thursday, April 19
- 30 Earn Professional Credits**

# Collaborative Intensive

Tuesday, April 17: 9:00 a.m. – 5:15 p.m.

**This totally NEW Collaborative Intensive day** is a dynamic and highly interactive session that will offer big ideas for Christian leaders like you. This full-day experience features some of today's most innovative thinkers in the Christian leadership arena, and will examine a wide spectrum of ideas for leading Christian nonprofit organizations with excellence.

We'll explore the pressing trends, creative challenges and unique opportunities of our time. And we'll do it all through a biblical lens, considering how Christ wants us to lead for IMPACT in this moment.

The Collaborative Intensive day will be broken into two sections:

**A**  
**Collaborative Intensive General Session — Big Impact Ideas**  
Tuesday, April 17  
9:00 a.m. – 12:30 p.m.

**B**  
**Collaborative Intensive Roundtable Experiences**  
Tuesday, April 17  
2:00 p.m. – 5:15 p.m.

Tuesday, April 17: 9:00 a.m. – 12:30 p.m.

## **A** Collaborative Intensive General Session — Big Impact Ideas

**The morning session** will feature 15-minute, main stage big impact idea presentations by nine frontline Christian leaders that could change the way you think about your leadership and your organization today. This dynamic general session will provide some of today's most innovative thinking related to Christian nonprofit leadership. In these presentations, we'll examine big ideas in leadership, governance, financial management, tax and legal issues, HR, resource development, marketing and communications and mastering today's technology. Outcomes: 1) Gain insight on the big ideas across the spectrum of Christian nonprofit leadership, 2) Examine your organization relative to those big ideas, and 3) Apply new ideas to strengthen your leadership and the success of your organization.

1. **Executive Leadership: Tom Lin**, President, InterVarsity Christian Fellowship, USA
2. **Executive Leadership: Edgar Sandoval**, COO, World Vision, US
3. **Board Governance: Sam Wolgemuth**, Board Member — ECCU and Alpha USA
4. **Financial Management: George Cook**, Institutional Consulting Director, Graystone Consulting
5. **Tax and Legal: Stu Lark**, Member/Attorney, Sherman & Howard
6. **People Management and Care: Dee Ann Turner**, Vice President, Enterprise Social Responsibility, Chick-fil-A
7. **Resource Development: Steve Kaloper**, CEO/Founder, Development Services Group
8. **Marketing & Communications: Shannon Litton**, President/CEO, 5by5
9. **Information Technology: Tim Kachuriak**, Chief Innovation and Optimization Officer, NextAfter

*Overview*



Tuesday, April 17: 2:00 p.m. – 5:15 p.m.



## Collaborative Intensive Roundtable Experiences

We'll divide the afternoon into these three Collaborative Intensive Roundtable Experiences: 1) Leadership, 2) Stewardship, and 3) Relationship.

These highly interactive sessions will allow you to hear from experts, process “big impact ideas” together and go deeper on these vital topics. Each participant will choose to attend one of these three roundtable experiences.

These three roundtable experiences mirror the three key tracks in CLA's Credentialed Christian Nonprofit Leader (CCNL) program.

- **The Leadership Roundtable Experience** explores the big picture on leading and governing Christian nonprofit organizations well.
- **The Stewardship Roundtable Experience** examines how to best steward the financial and human resources of a Christian nonprofit organization.
- **The Relationship Roundtable Experience** evaluates how to winsomely communicate to connect the mission of a Christian nonprofit organization to the hearts and minds of those who will support and fund that unique kingdom work.

Each roundtable experience will be hosted by a member of CLA's National Advisory Council, and include a panel discussion and two additional presentations and discussions on key topics facing Christian leaders. Participants will have the opportunity to engage with the “big impact ideas” from our morning session asking: What did I hear? Why does it matter? What changes because of it? And then you will go even deeper, engaging with other thought leaders on important trends and innovations for Christian nonprofit leaders today.

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### 1. Leadership Roundtable Experience

▷ Hosted by CLA Advisory Council member **Marshall Dunbar**, Vice President of Spiritual Life, Christian Community Action

In this Leadership Roundtable Experience we'll explore together thought leadership on the trust-based governance and leadership of Christian nonprofit organizations. We will host an interactive panel with presenters from the morning session, and then hear dynamic, interactive presentations from experienced frontline leaders on biblical perspectives on board governance, and examine the vital importance of establishing the firm foundation of trust as a leader. And you'll be able to process with and gain insight from your peers. Outcomes: 1) Align your organization's governance along a distinctly Christian pathway for board governance, 2) Recognize key ways you can build trust as a leader, and 3) Apply insights on governance and leadership gleaned from your peers, and from some of today's compelling thinkers in this space.

▷▷ Thought leaders presenting include:

Host **Marshall Dunbar** with Panelists:

- ▷ **Tom Lin**, President, InterVarsity
- ▷ **Edgar Sandoval**, COO, World Vision
- ▷ **Sam Wolgemuth**, Board Member — ECCU and Alpha USA

**Dr. Gary Hoag**, International Liaison, ECFA

**Greg Henson**, President, Sioux Falls Seminary

**Dr. Wes Willmer**, CCNL, Principal, Wes Willmer Group, LLC

**Dr. Bruce McNicol**, President, TrueFace

**Megan Colabrese**, Associate Director, Navigators Atlanta Young Professionals

*Overview*



## 2. Stewardship Roundtable Experience

▷ Hosted by CLA Advisory Council member **Christine Talbot**, Senior Vice President, Human Resources, World Vision

In this Stewardship Roundtable Experience we'll examine together how to best steward the financial and human resources of Christian nonprofit organizations. And we'll consider key legal issues facing Christian nonprofits today. You'll hear from thought leaders who through their work with Christian nonprofits nationwide know what it takes to excel in Christian nonprofit financial management, to build high-performing staff teams and to protect your organization. We will also host an interactive panel with presenters from the morning session. And you'll be able to process with and gain insight from your peers. Outcomes: 1) Gain insight on best practices in ministry financial management, including key trends, 2) Create an effective plan for long-term financial sustainability, and 3) Identify and apply proven secrets for attracting, building and retaining high performing teams.

▷▷▷ Thought leaders presenting include:

Host **Christine Talbot** with Panelists:

- ▷ **George Cook**, Institutional Consulting Director, Graystone Consulting
- ▷ **Stu Lark**, Member/Attorney, Sherman & Howard
- ▷ **Dee Ann Turner**, Vice President, Enterprise Social Responsibility, Chick-fil-A

**Dan Busby**, President, ECFA

**Vonna Laue**, CCNL, Executive Vice President, ECFA

**Al Lopus**, President, Best Christian Workplaces Institute

**Tara VanderSande**, Staff Development Director, Willow Creek Community Church

[Overview](#)

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## 3. Relationship Roundtable Experience

▷ Hosted by CLA Advisory Council member **Jeremy Reis**, Director of Marketing, Food for the Hungry

In this Relationship Roundtable Experience we'll evaluate together how to best connect with the hearts and minds of those God may call to support your Christian nonprofit organization. We'll examine some of the most important trends in technology and communications, concepts that you must master for success in our rapidly changing ministry environment. And we will zero in on how we can connect deeply with major givers who could be critical partners for your organization for years to come. We will also host an interactive panel with presenters from the morning session. Plus, you'll be able to process with and gain insight from your peers. Outcomes: 1) Examine your organization's digital health, and master concepts to capitalize on today's technology, 2) Build lasting and transformational relationships with major givers, and 3) Ensure that your communications strategies are positively impacting your organization's key relationships.

▷▷▷ Thought leaders presenting include:

Host **Jeremy Reis** with Panelists:

- ▷ **Steve Kaloper**, CEO/Founder, Development Services Group
- ▷ **Shannon Litton**, President/CEO, 5by5
- ▷ **Tim Kachuriak**, Chief Innovation and Optimization Officer, NextAfter

**Chad Williams**, CEO, FiveQ

**Connie Hougland**, Senior Vice President, Ministry Services, National Christian Foundation Heartland

**Evan Lange**, Vice President of Gift Planning, National Christian Foundation Heartland

[Overview](#)



# Leadership Forums

Wednesday, April 18 – Thursday, April 19: 8:30 a.m. – 5:30 p.m.

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## ▽ Wednesday, April 18

### Executive Leadership

Wednesday, April 18: 8:30 a.m. – 5:30 p.m.

#### 1. CEO Forum

▷ Hosted by CLA Advisory Council members **Cary Vaughn**, CCNL, President & CEO, Love Worth Finding Ministries, Inc., and **Ed Morgan**, President Emeritus, The Bowery Mission and President, Inspirational Leadership, LLC

*Forum Space Limited: Pre-Registration Required Online (This Forum is designed for an organization's most senior leader: CEOs, Presidents, Executive Directors, etc.)*

### Leadership Impact: Investing for the Future

You have invested your heart, mind and soul into your role as a Christian leader. You want to make a difference, not only for the moment, but for generations to come. One of your most important stewardship responsibilities is to develop the next generation of leaders for your organization. That's why you must be intentional about the culture you create, the pathway you pursue and the outcomes you achieve. In this highly interactive CEO Forum you will explore the conviction, culture and construct, and why all three are foundational to effectively developing future leaders. You will be able to assess where you are and gain insights from other CEOs on best practices that have strengthened their leadership bench and transformed their organizations. Outcomes: 1) Assess the level of conviction, culture and construct in your organization, 2) Discover proven best practices and options to cultivate all three, and 3) Apply practices that will have immediate and long term impact on how your leaders grow.

▷▷▷ Thought leaders presenting include:

**Eric Geiger**, Vice President, Resources Division, Lifeway

**Phyllis Hendry**, President & CEO, Lead Like Jesus,

with Panelists:

▷ **Bob Lonac**, President & CEO, Crista

▷ **Doug Mazza**, President & COO, Joni and Friends

▷ **Al Lopus**, President, Best Christian Workplaces Institute

**Dr. Teresa Moon**, CCNL, Founding President/CEO, Institute for Cultural Communicators

*Advanced (Focuses on the development of in-depth topic/subject area knowledge, most appropriate for seasoned professionals)*



## People Management and Care

Wednesday, April 18: 8:30 a.m. – 5:30 p.m.

### 2. Chief Human Resource Officer Forum

- ▷ Hosted by CLA Advisory Council Members: **Ray Chung**, HR Professional, HOPE International and **Christine Talbot**, Senior Vice President, Human Resources, World Vision
- Forum Space Limited: Pre-Registration Required Online  
(This forum is designed for an organization's most senior HR officer).*

### Recruiting, Engaging and Leading Employees with Excellence

As the chief Human Resource officer for your organization, you're tasked with recruiting, engaging and leading excellent staff teams. In this highly interactive forum, you'll hear from proven experts who will help you explore how to find the right talent by building a compelling culture, and how to maximize employee engagement, which is the key to productivity, innovation, employee satisfaction and retention. You will also gain insight on what employees today are saying they most want their employers to know. Outcomes: 1) Find the right talent for your organization, and build a compelling culture that energizes their success, 2) Assess your organization's current levels of employee engagement, and implement a plan to increase engagement for a team, department or organization, and 3) Discover what new research says are the four main things that employees want their employers to know.

▷▷▷ Thought leaders presenting include:

**Dee Ann Turner**, Vice President, Enterprise Social Responsibility, Chick-fil-A,  
and **Christine Talbot**, Senior Vice President, Human Resources, World Vision

**Debra Kellar**, Vice President of Finance and Campus Operations, Denver Seminary

**Robert McFarland**, President, Transformational Impact, LLC

*Advanced (Focuses on the development of in-depth topic/subject area knowledge,  
most appropriate for seasoned professionals)*



## Resource Development

Wednesday, April 18: 8:30 a.m. – 5:30 p.m.

### 3. Chief Development Officer Forum

▷ Hosted by CLA Advisory Council members: **Christina Moore**, Vice President, Client Services, Dickerson, Bakker & Associates and **Michael Baker**, Vice President of Strategic Services, Dunham+Company

*\*Forum Space Limited: Pre-Registration Required Online*

*(This Forum is designed for an organization's most senior development officer.)*

### Today's Giving Trends, Approaches and Vital Relationships

If you lead a ministry development program, this Chief Development Officer forum is designed just for you. In this highly interactive forum, we will explore some of the most important trends and topics facing CDOs today. We will discuss navigating well the complementary roles and responsibilities of CDOs and CEOs for fundraising impact. We will explore new ways of giving and new strategies for engaging people God is motivating to give to your ministry. And we will examine generosity trends impacting Christian nonprofit organizations today. Outcomes: 1) Build a strong CDO/CEO relationship in your organization in order to collaborate well for development impact, 2) Embrace innovative new methods, strategies and practices in the giving arena, and 3) Apply insights from studies and research on important generosity trends.

▷▷ Thought leaders presenting include:

**Dr. David Alexander**, President, Alexander Resource Strategies

**Jim Loscheider**, Vice President of Donor Ministries, Samaritan's Purse

And a "Generosity Trends" panel featuring:

▷ **Susie Lipps**, Founder, AWIP Consulting

▷ **Rick Dunham**, CEO, Dunham+Company

▷ And more...

*Advanced (Focuses on the development of in-depth topic/subject area knowledge, most appropriate for seasoned professionals)*



## Financial Management

Wednesday, April 18: 8:30 a.m. – 5:30 p.m.

### 4. Chief Financial Officer Forum

▷ Hosted by CLA Advisory Council members: **Nathan Salsberry**, CapinCrouse and (tbd)

*Forum Space Limited: Pre-Registration Required Online  
(This Forum is designed for an organization's most senior financial officer.)*

## Economic Trends, Financial Reporting Developments and Your Finance Department

As the chief financial officer for a Christian nonprofit organization you face a world of complexity, and offer a vital role in helping your organization achieve its kingdom mission. In this forum we will examine U.S. economic trends that will impact your stewardship of ministry finances. We will explore the best ways to communicate key financial data with boards. And we will consider some of the key financial reporting changes and trends impacting the Christian nonprofit world today. Then we will discuss how your finance department can be a “mission accelerator” for your organization. Outcomes: 1) Wisely steward ministry finances in light of today’s economy, while reporting financial information well to boards and other key stakeholders, 2) Develop strategies to implement the biggest change in nonprofit financial reporting in 20 years, and 3) Propel your finance office to become the “mission accelerator” within your organization.

▷▷▷ Thought leaders presenting include:

**Bryan Taylor**, Principal, CEO and Chief Investment Officer, Cornerstone Financial

**Mike Batts**, Managing Partner, Batts Morrison Wales & Lee

**Mike Lee**, Partner and National Director of Audit and Assurance Services, Batts Morrison Wales & Lee

**Mark Tjernagel**, CFO, Cru

*Advanced (Focuses on the development of in-depth topic/subject area knowledge, most appropriate for seasoned professionals)*





## ▽ Thursday, April 19 — Leadership Forums

### Executive Leadership

Thursday, April 19: 8:30 a.m. – 5:30 p.m.

### 5. Christian Women in Leadership Forum

▷ Hosted by **Chris Adams**, Author, Speaker & Women's Ministry Consultant  
*Forum Space Limited: Forum Pre-Registration Required Online  
(This Forum is designed for Christian women in all levels of leadership.)*

### Generations: Women in Christian Leadership

God is today calling women of all ages to Christian leadership. Though from differing generations, we can learn much from one another. How do we build the body of Christ through each generation's unique leadership gifts? In this interactive session, hear unique traits of the different generations and discover practical ways to learn from and invest in one another. Outcomes: 1) Appreciate the cultural and behavioral differences determining each generation's approach to leadership, 2) Intentionally work to connect all generations of women in leadership, and 3) Proactively implement strategies to learn from those in a generation ahead of you, and mentor those in a generation behind you.

*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*



# Full-Day Intensive Seminars

Wednesday, April 18 – Thursday, April 19: 8:30 a.m. – 5:30 p.m.

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## ▽ Wednesday, April 18

### People Management and Care

Wednesday, April 18: 8:30 a.m. – 5:30 p.m.

#### 1. Making the Most of Conflict and Difficult Conversations

Your impact as a leader depends on your ability to manage and direct conflict. This session prepares you to make the most of it in leadership and life. Outcomes: 1) Adopt strategies to improve teamwork, trust, clarity, innovation, commitment, and decision-making in your team, 2) Identify your own style and broaden your repertoire to manage emotion and achieve personal and professional goals, and 3) Employ new model and strategies for conducting difficult conversations.

▷ **Dr. Andrew Johnston**, Director, Learning & Development, The Gideons International  
*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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### Executive Leadership

Wednesday, April 18: 8:30 a.m. – 5:30 p.m.

#### 2. Multiplying Leadership Impact through Sabbath

This interactive intensive focuses on a leader's heart and soul, centering on the Sabbath as the fulcrum for a healthy rhythm of life. It includes practical strategies to live this out. Outcomes: 1) Develop a biblical understanding of the importance of Sabbath for a healthy rhythm of life, 2) Share and learn practices and tools to strengthen living out a personal Sabbath such as becoming more effective in hearing God, and 3) Create an actionable personal plan for practices that nourish the soul.

▷ **Roy and Margaret Fitzwater**, Co-Directors Navigator Church Ministries, and **Peggy Reynoso**, Staff Development & Care Consultant, The Navigators  
*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*



## Executive Leadership

Wednesday, April 18: 8:30 a.m. – 5:30 p.m.

### 3. Leading Through Transitions

Today we are confronted with wave upon wave of tumultuous and unanticipated change events that demand rapid learning, adaptability and commitment. Authentic leaders navigate structural challenges of change while guiding people through the emotions of transition. This session draws upon personal leadership experience and research from the Center for Creative Leadership. Outcomes: 1) Comprehend the human impact of change and transition, 2) Lead others through emotionally challenging times of uncertainty while building and supporting trust, and 3) Develop authentic leadership skills to facilitate change.

- ▷ **Dr. Albert L. Reyes**, President & CEO, Buckner International and **Bill Frisby**, CCNL, CEO/Founder, Strengthening Leaders, L3C  
*Advanced (Focuses on the development of in-depth topic/subject area knowledge, most appropriate for seasoned professionals)*

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## Internet and Technology / Resource Development

Wednesday, April 18: 8:30 a.m. – 5:30 p.m.

### 4. From Follower to Follow Up: Acquiring Donors on the Web

Gain insights on becoming an irresistible lead magnet, acquiring leads, creating a nurturing email series, getting the donation and thanking the donor. Master content strategy. Explore the digital donor life cycle, and examine real case studies of digital donor acquisition. Outcomes: 1) Create an irresistible lead magnet that resonates with the right audiences, 2) Find the right leads — using digital advertising to target the right people, and 3) Master content strategy and develop a cultivation email series that actually works.

- ▷ **Jeremy Reis**, Marketing Director, Food for the Hungry, **Chad Crawford**, Vice President, BBS & Associates, and **Georgia Joseph**, Founder/Owner, Content Strategy Solutions  
*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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## Communications and Marketing

Wednesday, April 18: 8:30 a.m. – 5:30 p.m.

### 5. What's Working Now

Explore proven marketing opportunities to fuel your growth. Discover what's working in marketing and communications today, and how you can practically leverage platforms, practices and strategies to optimize your ministry's clarity and reach. Outcomes: 1) Recognize important trends that could change how you communicate and break through communications clutter, 2) Apply practical strategies proven to increase your marketing effectiveness and efficiency, and 3) Implement a more strategic and ROI-focused approach to motivate your audience to act.

- ▷ **Shannon Litton**, CEO / President, **Mike Schatz**, COO, and **Josh Miller**, Chief Creative Officer, 5by5  
*Basic*



## ▽ Thursday, April 19 — Leadership Forums

### Executive Leadership

Thursday, April 19: 8:30 a.m. – 5:30 p.m.

#### 6. Steward Leaders Achieve Kingdom Impact

Come discover the difference between worldly success and kingdom impact and be equipped as a steward leader to be used by God to meet kingdom objectives that have eternal value. Outcomes: 1) Discover your unique call to lead for kingdom impact not just worldly success, 2) Define your role as a steward leader for this work, and 3) Develop your battle plan to lead for God's eternal purposes.

▷ **Dr. Scott Rodin**, *President, The Steward's Journey*, **Dr. Mark L. Vincent**, *CCNL, President, The Design Group, Intl.*, **Andrea Leigh Capuyan**, *Executive Director, Laurel Pregnancy Center*, and **Ron Frey**, *President, Frey Resource Group*.

*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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### Resource Development

Thursday, April 19: 8:30 a.m. – 5:30 p.m.

#### 7. Improve Your Fundraising Now!

Explore topics such as how often to ask for donations, when branding inhibits results, biblical foundations for solicitation, trends complicating gift attribution, the importance of analytics and more! Outcomes: 1) Avoid common response killers in online and offline direct-response fundraising, 2) Apply direct-response fundraising analytics to accurately assess a ministry's fundraising health while preparing for a significant growth in donations, and 3) Grasp how proper fund attribution helps shape expectations for online and offline giving, and examine trends in donor "channel-switching."

▷ **Douglas Shaw**, *Chairman/CEO, Wiley Stinnett*, *Executive Creative Director/Sr. Vice President, Strategy & Insights*, and **Amy Sewell**, *Director of Digital Solutions, Douglas Shaw & Associates*

*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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### Executive Leadership

Thursday, April 19: 8:30 a.m. – 5:30 p.m.

#### 8. DISCover the Leader God Made You to Be

A session designed to help participants discover their unique behavioral style by utilizing the biblical DISC assessment and application guide. This Assessment correlates behavioral styles to biblical characters and reveals how God utilizes your strengths to become the leader he created you to be. Outcomes: 1) Develop accurate self-awareness (a key indicator of leader's success potential), 2) Discern how to resolve workplace conflicts and interpersonal challenges, and 3) Develop strategies to increase team effectiveness and drive results.

▷ **Rich Meiss**, *Director, Leadership Development, Lead Like Jesus*

*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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## Resource Development

Thursday, April 19: 8:30 a.m. – 5:30 p.m.

### 9. Grow an Abundance of Major Giving

Big gifts make a big impact. Three essential elements are critical to major giving. Become proficient at all three and you will drive an abundance of generosity like never before. Outcomes: 1) Understand why four dimensions of relational connectivity are vital, and how to cultivate each, 2) Identify how, what and when major donors want to hear from you, and communicate accordingly, and 3) Plan and implement pivotal experiences to touch major donors' hearts and elevate their giving.

▷ **Derric Bakker**, President, Dickerson, Bakker & Associates

*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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## Board Governance

Thursday, April 19: 8:30 a.m. – 5:30 p.m.

### 10. Increasing Board Impact

Board members want to bring more value to their organization but struggle to know what to do. This workshop will provide advanced governance topics for boards that want more impact. Outcomes: 1) You will learn how to help your board think more strategically together, 2) You will be able to help others understand the value of scenario planning, and 3) You will help your board approach their role with an outward mindset.

▷ **Dr. James Galvin**, President, Galvin & Associates, Inc., **John Savage**, CEO, Artios and **Kent Stroman**, Founder, Stroman & Associates

*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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## Tax & Legal

Thursday, April 19: 8:30 a.m. – 5:30 p.m.

### 11. Basics of Federal Tax Compliance

This session focuses on fundamentals of federal tax compliance for ministries. Topics include: protecting exempt status; excess benefit transactions; unrelated business income; foreign grant-making; compensation-setting; conflicts of interest and more. Outcomes: 1) Understand the overarching principles of a sound tax compliance strategy for ministries, 2) Evaluate areas where an organization may be able to update or improve current practices, and 3) Implement strategies to reduce compliance risk, and take advantage of tax planning opportunities.

▷ **Mike Batts**, Managing Partner, Michele Wales, Partner and National Director of Tax Services, **Julie James**, Partner and Director of Tax Compliance Services, and **Kaylyn Varnum**, Manager, Batts Morrison Wales & Lee, PA

*Overview*



## Resource Development

Thursday, April 19: 8:30 a.m. – 5:30 p.m.

### 12. Mid Donor Strategy and Execution

There has been a lot of buzz in the nonprofit world the past few years about the importance of mid-level donor programs, but do you know where to start? This workshop suggests some basic definitions and strategies for starting a mid-level program (or enhancing an existing one) which can lead to game-changing income for your cause! Outcomes: 1) Develop a working definition of mid donor giving, 2) Immediately begin executing proven, practical tactics, and 3) Create a staffing strategy for long-term effectiveness.

- ▷ **J. Paul Fridenmaker**, *Fellow, Tandon Institute*, and **Elaine Watkins**, *Chief Development Officer, Precept Ministries International*  
*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*
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## Financial Management

Thursday, April 19: 8:30 a.m. – 5:30 p.m.

### 13. Finance and Accounting Best Practices for Ministries

Organizations face new changes each day and finance and accounting personnel are called upon to provide leadership. This session will examine areas of key importance ranging from FASB accounting standards updates to how to communicate financial information effectively with a multitude of stakeholders within and outside your organization. Outcomes: 1) Understand key new requirements facing finance and accounting professionals, 2) Apply insights from what other organizations are doing to address these challenges, and 3) Communicate financial information effectively with ministry stakeholders.

- ▷ **Vonna Laue**, *CCNL, Executive Vice President*, **John Van Drunen**, *Executive Vice President/General Counsel*, and **Kaitlyn Peyton**, *Staff Accountant, ECFA*  
*Basic*



# Workshops

Wednesday, April 18 – Thursday, April 19: 8:30 a.m. – 5:30 p.m.

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## ▽ Wednesday, April 18

### ▽ Executive Leadership

Wednesday, April 18: 9:00 – 10:30 a.m.

#### 1. Déjà vu All Over Again

Ministries need to learn these 4 valuable lessons that the business world has embraced over these last 25 years. Outcomes: 1) Build strategy focused on key ministerial principles from vision to mission critical initiatives to organization alignment, 2) Align stakeholders from the board and staff to donors, instead of exclusively concentrating on budget and scheduling, 3) Select your technology platform only after re-engineering key work processes, and 4) Secure both critical internal and external talent, understanding when each is most appropriate.

▷ **Stephen Reiter**, *Senior Vice President, Masterworks*  
*Overview*

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Wednesday, April 18: 2:00 – 3:30 p.m.

#### 2. Grow Your Start-Up to Mid-Size

As a start-up grows into a mid-size organization, passion isn't enough for sustainable growth. Leaders must employ strategies to create the necessary infrastructure, ensuring program success. We'll examine leadership principles and strategic planning tools that can help any size organization be not only a strong ministry, but also a healthy organization. Outcomes: 1) Acquire practical tools to help with planning and monitoring growth, 2) Identify common pitfalls, and 3) Embrace building teams rather than carrying the load alone.

▷ **Beth Guckenberger**, *Co-Executive Director, Back2Back Ministries*  
*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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Wednesday, April 18: 3:45 – 5:15 p.m.

#### 3. #InnovateorDie

Current leadership issues are challenging norms and strategies, making the usual ineffective and the unusual effective. We will explore what it means to innovate everything, e.g. communication, leadership, even diversity. Outcomes: 1) Identify opportunities to break the usual patterns and invite unusual methods, 2) Adopt new initiatives and construct creative methods to realize greater potential in your leadership and organization, and 3) Build strategies to break old habits and seek innovative/creative methods that maximize opportunities.

▷ **Arthur Satterwhite**, *Principal, Satterwhite & Co.*, and **Dr. Kathleen Patterson**, *Director, Doctorate of Strategic Leadership Program, Regent University*  
*Basic*



## ▽ Resource Development

Wednesday, April 18: 9:00 – 10:30 a.m.

### 4. Major/Mega-Donors and You

Asking for major and mega gifts can be intimidating. This workshop will share best practices and practical tips from our years of experience and our current \$1.3 billion-dollar campaign. What do I say? How do I say it? When do I ask? How do I ask?

Outcomes: 1) Earn the opportunity to ask, 2) Develop effective solicitation strategies, and 3) Frame your ask with scripts from our successful major donor conversations.

▷ **Pat McLaughlin**, *President & Founder, The Timothy Group*

*Basic*

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Wednesday, April 18: 2:00 – 3:30 p.m.

### 5. Hidden Treasure: Managing Mid-level Donors

Nonprofits feverishly hunt for major gifts, yet hidden treasure remains dormant in donor files. Learn to successfully bridge the gap between annual and major gifts with impactful mid-level donor programs. Outcomes: 1) Discover how you can effectively data mine your donor file to unearth mid-major prospects, 2) Acquire the essentials of crafting donor messaging that compellingly tells your nonprofit's story, and 3) Master step-by-step methods to launch, manage, and grow a vibrant mid-level donor program.

▷ **Michael Brown**, *Associate Director, Philanthropic Service for Institutions, North American Division of Seventh-day Adventists*

*Basic*

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Wednesday, April 18: 3:45 – 5:15 p.m.

### 6. Progress Report: Pathway to \$1 Billion

Hear the inspiring story and apply to your organization lessons learned from Alliance Defending Freedom, as they've followed God's leading to significantly extend their impact with an ambitious \$1 billion estate gift goal. Outcomes: 1) Set a clear and compelling planned gift goal that fits your ministry, 2) Build a customized ministry-tested strategy to achieve that goal, and 3) Create a system to track your results and better serve your ministry partners.

▷ **Mike Buwalda**, *President/Founder, Money for Ministry* and **Lisa Reschetnikow**, *President & Corporate General Counsel, ADF Foundation*

*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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Wednesday, April 18: 9:00 – 10:30 a.m.

### 7. Grant Funding and Case Statements

Grant funding is often overlooked as a source of revenue for ministries. Developing a case statement for funding opportunities can reduce time and frustration and help ministries tell their story. Outcomes: 1) Determine when to use a case statement, 2) Identify what to include in the case statement and what to leave out, and 3) Gain insight from a template that can be used to develop your case statement.

▷ **Debbie DiVirgilio**, *CCNL, President, Faith Based Nonprofit Resource Center*

*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*





## ▽ Resource Development

Wednesday, April 18: 2:00 – 3:30 p.m.

### 8. Best Practices in Charitable Gift Annuity Administration

Starting a charitable gift annuity program? Or is your current program struggling? We'll provide practical Charitable Gift Annuity (CGA) guidelines, tools and insights to augment your fundraising efforts and deepen donor relationships. Outcomes: 1) Create a healthy donor pool through strategic gift acceptance decisions that support your fundraising objectives, 2) Uncover tools and best practices to administer charitable gift annuities efficiently and effectively, and 3) Deepen relationships with your donors by maximizing natural touch points generated by your CGA program.

- ▷ **Kurt Knoll**, Director, Investment Services & New Business Development, and **Cindi Riemersma**, Client Services Administrator, Barnabas Foundation  
*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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Wednesday, April 18: 3:45 – 5:15 p.m.

### 9. Why and How to Create a Development Plan that Works

A good development program begins with a practical, detailed, and realistic development plan that tells the story of where your ministry has been, where it's going, and how it's going to get there. Outcomes: 1) Where are you? Determine how to conduct a situational or SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis, 2) Where do you want to go? Develop a strategic vision, and 3) How are you going to get there? Build a strategic plan.

- ▷ **Kyle Vander Meulen**, Senior Consultant, American Philanthropic, LLC  
*Basic*

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## ▽ Financial Management

Wednesday, April 18: 9:00 – 10:30 a.m.

### 10. Mastering the NEW Financial Statement Model

An in-depth look at what you need to know about Phase One of the Financial Accounting Standards Board Accounting Standards Update (ASU) 2016-14, with practical how-to guidance on implementation. Outcomes: 1) Explain the purpose and key principles of the new financial statement model, 2) Assess the impact on financial reporting for your organization, and 3) Plan your implementation strategy.

- ▷ **Fran Brown**, Partner, Professional Practice Leader — Attest, CapinCrouse  
*Basic*

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Wednesday, April 18: 2:00 – 3:30 p.m.

### 11. How to Start Funding the Future God is Calling You to

We all know that we need to save for the future, and we know that starting now is better than later. However, taking the first step, or starting over, can seem overwhelming. Explore the key components to financially preparing for the future — from knowing how to make investment decisions to discovering your personal approach to money. Outcomes: 1) Learn the basics about retirement preparation, 2) Start preparing for your future, and 3) Avoid common mistakes in retirement planning.

- ▷ **Bruce Bruinsma**, CEO/Founder, Envoy Financial  
*Basic*



## ▽ Financial Management

Wednesday, April 18: 3:45 – 5:15 p.m.

### 12. Jesus' *Terrible* Financial Advice for Leaders

Jesus' financial advice goes well beyond giving, to every facet of living. The purpose of this presentation is to address the questions Christian leaders have about money. Outcomes: 1) Discover what Jesus says about prosperity, deception, justice, profit, stewardship and ownership. 2) Explore ways in which Jesus' terrible financial advice impacts and transforms ministries, and 3) Collaborate with peers to identify strategic ways to implement Jesus' financial advice.

- ▷ **Dr. John Thornton**, Chair and Professor, Leung School of Accounting, Azusa Pacific University and **James Elliott**, Vice President of Stewardship, Moody Global Ministries  
*Basic*
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## ▽ People Management and Care

Wednesday, April 18: 9:00 – 10:30 a.m.

### 13. Resolving Organizational Conflict

Managers and employees understandably hope to avoid disagreement and conflict. But when you participate in this workshop, you'll gain practical insight for identifying root causes and discovering healthy solutions. Outcomes: 1) Identify the sources of unhealthy attitudes, environments, and behaviors, 2) Create strategies for effective interventions, and 3) Apply Christ-centered principles in implementing constructive change at all levels while reinforcing your organization's core values.

- ▷ **Dr. Michael Hare**, Staff Chaplain/Ombudsman, Compassion International  
*Basic*
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Wednesday, April 18: 2:00 – 3:30 p.m.

### 14. Leading Virtual Teams

Leading an effective team is challenging, particularly a team separated by distance and culture. Gain insight on effectively leading teams that are dispersed and diverse through timeless principles from the life of the Apostle Paul, as well as best practices for virtual collaboration. Outcomes: 1) Discover principles from how the Apostle Paul led and shepherded over distance with limited face-to-face interaction, 2) Apply best practices of leading virtual teams, and 3) Implement practical tips and tools for effective virtual team meetings and collaboration.

- ▷ **Erik Butz**, Vice President, Global Operations and **Andrea Buczynski**, Vice President, Global Leadership Development, Cru  
*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*
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Wednesday, April 18: 3:45 – 5:15 p.m.

### 15. How to Engage Millennials in the Workplace

This workshop provides specific and practical strategies and tools to help organizational leaders to engage and lead their millennial workforce. Outcomes: 1) Demystify the millennial generation through providing accurate insights into generational science, 2) Apply practical and actionable insights into how to engage and lead the millennial workforce, and 3) Integrate best practices on how to bridge intergenerational communication.

- ▷ **Paul Sohn**, Founder & CEO, QARA  
*Overview*



## ▽ Communications and Marketing

Wednesday, April 18: 9:00 – 10:30 a.m.

### 16. Everything You Know is Coming Untrue

Throughout history definitive moments have marked cultural shifts when everything we knew about influence changed. We live in such a moment. All the rules of communication are being redefined. This workshop offers unexpected ideas on behavior versus intuition, and how to communicate to be heard. Outcomes: 1) Unravel why cultural communication is shifting, and how to gain a voice, 2) Discover marketing tools changing communications, and apply insider tips on using them effectively, and 3) Create a personal manifesto to guide your future communication efforts.

▷ **Mandy Arioto**, *President & CEO, MOPS International*  
*Basic*

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Wednesday, April 18: 2:00 – 3:30 p.m.

### 17. Rebrand and Revitalize Your Ministry

In this session we will break down the steps, including the research process, required to successfully rebrand and revitalize once strong ministries. You'll learn how to rebrand your ministry without alienating your base. Outcomes: 1) Ask the right questions leading to a successful rebrand, 2) Grasp why data matters most in this process, and which data is needed for success, and 3) Enthusiastically embrace a new season of revitalization for your organization.

▷ **Guy Richards**, *Founder & CEO, Abiah*  
*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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Wednesday, April 18: 3:45 – 5:15 p.m.

### 18. Getting Ahead of our Future Reality

This workshop will help you understand Virtual Reality, Augmented Reality + Artificial Intelligence and how those technologies will impact the future of your ministry. Outcomes: 1) Gain practical knowledge of Virtual Reality, Augmented Reality + Artificial Intelligence, 2) Acquire perspective on where these technologies are going in the next five years and how that will impact the ministry communication landscape, and 3) Begin integrating these technologies efficiently and effectively today and in the future.

▷ **Nils Smith**, *Chief Strategist, Social Media+Innovation, Dunham+Company*  
*Basic*

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## ▽ Board Governance

Wednesday, April 18: 9:00 – 10:30 a.m.

### 19. Secrets to Lasting Board Change

We'll use rich insights to help you initiate meaningful change for the long haul. You'll explore the cause of board dysfunctions and glean new wisdom about the changes to make. Outcomes: 1) Together, we'll paint a realistic portrait of your board to identify what should change, 2) Apply insights from this session to develop a wise plan for changing your particular board, and 3) Establish a strategy for healthy board meetings, members, roles, structures, communication patterns, behavior and expectations.

▷ **Dr. Sid Webb**, *President, Build What Counts*  
*Overview*



## ▽ Board Governance

Wednesday, April 18: 2:00 – 3:30 p.m.

### 20. Characteristics of Top Performing Boards

This workshop will provide practical and insightful guidance on the responsibilities of boards, and explore how to improve your board to allow it to be a high functioning force for your organization. Outcomes: 1) Discern the distinctions between the responsibilities of the board and management related to managing, overseeing and running the organization, 2) Develop healthy and appropriate relationships between the board and management, and 3) Apply practical guidance for improving board performance.

▷ **Daniel Waninger, Director, and Nick Wallace, Director, BKD**

*Advanced (Focuses on the development of in-depth topic/subject area knowledge, most appropriate for seasoned professionals)*

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Wednesday, April 18: 3:45 – 5:15 p.m.

### 21. Building Boards for Kingdom Impact

To deliver greater kingdom impact for Christ, a board must be strategically built and well led. We will discuss various tools and approaches board chairs and executive directors can use to build and lead a board for greater kingdom impact. Outcomes: 1) Define what kingdom impact means in your ministry, 2) Discern how to build a board that delivers kingdom impact, and 3) Apply principles to lead your board for superior kingdom impact.

▷ **Tom Okarma, CCNL, Founder, Vantage Point**

*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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## ▽ Tax & Legal

Wednesday, April 18: 9:00 – 10:30 a.m.

### 22. Child Protection — US and Abroad

To strengthen the impact of today's Christian leaders, we must be aware of our important duty of care in ensuring safe environments. What does that mean in today's world? Outcomes: 1) Understand the risk of child sexual abuse. Determine how this risk unfolds in ministry programming and how to address this risk, 2) Discern the changing legal and legislative environment related to child sexual abuse, and 3) Apply insights on preparing for and responding to an allegation of child sexual abuse.

▷ **Peter Persuitti, Managing Director | Religious Practice, Arthur J. Gallagher & Co. and Greg Love, co-founder, Ministry Safe, Attorney, Love & Norris Attorneys, and H. Robert Showers, Esq., Owner, Simms Showers, LLP**

*Advanced (Focuses on the development of in-depth topic/subject area knowledge, most appropriate for seasoned professionals)*



## ▽ Tax & Legal

Wednesday, April 18: 9:00 – 10:30 a.m.

### 23. Pulse on Capitol Hill and Legal Developments

Join this session to keep a pulse on the latest issues impacting churches and ministries. The state of many policy issues, including the future of comprehensive tax reform, will directly impact nonprofits and churches. These once in a generation policy changes could dramatically restrict incentives for givers to support churches and ministry.

Outcomes: 1) Update leaders on policy issues that may impact their church or ministry, 2) Analyze the impact of comprehensive tax reform, and 3) Discuss challenges of recent litigation and its ramifications going forward.

▷ **Dan Busby**, *President*, and **John Van Drunen**, *Executive Vice President/General Counsel, ECFA*, and **John Wylie**, *Member/Attorney, Sherman & Howard*

*Basic*

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Wednesday, April 18: 3:45 – 5:15 p.m.

### 24. Stump the Lawyer

This workshop offers a brief survey of legal hotspots facing nonprofits in 2017, followed by an open forum in which attendees can ask their most pressing general legal questions. Outcomes: 1) Strengthen awareness of the legal issues nonprofits are most likely to encounter, 2) Determine how to engage pressing legal challenges in a legally and theologically sound manner, and 3) Gain insight on how to position your organization to minimize exposure to liability.

▷ **David Hyams**, *Of Counsel*, and **H. Robert Showers, Esq.**, *Owner, Simms Showers, LLP*

*Basic*



## ▽ Thursday, April 19 — Workshops

### ▽ Executive Leadership

Thursday, April 19: 9:00 – 10:30 a.m.

#### 25. Impact at the Intersection of Theology & Business

At Biola's Crowell School of Business, we view *Business as Ministry*; the intersection of theology and business is an impactful combination. Outcomes: 1) Gain an understanding of a good theology of work, 2) Assess your leadership role and effectiveness in your workplace, 3) Articulate practical ways to apply biblical principles and a better *business as ministry* mindset to your leadership/stewardship.

▷ **Dr. Gary Lindblad**, Dean, and **Dr. Robert Harp**, Director of Strategic Initiatives, The Crowell School of Business, Biola University

*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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Thursday, April 19: 2:00 – 3:30 p.m.

#### 26. Leadership: Mission, Mercy and Transformation

Examine leadership studies, based in biblical and academic research, which will produce high impact results and learning outcomes as you integrate Mission, Mercy and Transformation into your organization. Outcomes: 1) Articulate how being true to your organization's Mission results in positive outcomes, 2) Explain how applying principles of Mercy in your organization results in positive outcomes, and 3) Implement a Transformational Leadership style in your organization that results in positive outcomes.

▷ **Dr. Monty McNair**, Director of Masters of Arts in Organizational and Global Leadership Studies, and **Dr. Kirk D. Mallette**, Dean, Graduate & Online Studies, York College

*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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Thursday, April 19: 3:45 – 5:15 p.m.

#### 27. Executive Essentials in Contrary Times

In this contrary culture, ministry executives encounter personal challenges as well as opportunities. We will explore 13 key character essentials that will position you to lead yourself and your people well. Outcomes: 1) Attendees will gain an understanding of the keystone to all godly leadership: character, 2) Attendees will examine and ponder key factors that can strengthen their personal leadership character, and 3) Attendees will identify areas in their own lives where compromise can bring ruin.

▷ **Mark Hancock**, CCNL, CEO, Trail Life USA

*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*



## ▽ Executive Leadership

Thursday, April 19: 9:00 – 10:30 a.m.

### 28. Manage Outcomes to Maximize Impact

How do you know if your organization is making a real difference? Master the art of managing and measuring outcomes and you will raise more money and achieve a greater impact. Outcomes: 1) Identify what you should be measuring, and how to establish impact-reporting systems, 2) Monitor progress toward goals, and use feedback loops to understand what's working and what's not, and 3) Incorporate best practices and emerging standards to build an outcomes-centered culture at your organization.

- ▷ **Cole Costanzo**, Senior Vice President, Dickerson, Bakker & Associates  
*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*
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Thursday, April 19: 2:00 – 3:30 p.m.

### 29. Innovation Strategies that Work

Forward-leaning ministries innovate in a disciplined way that drives results. Learn the Human Centered Design process and explore tools such as Customer Journey, Empathy Maps, Nonlinear Interviewing, Mind Maps and more. Outcomes: 1) Understand the barriers to successful innovation, and how to clear them, 2) Learn the process of Human Centered Design, and how to employ it, and 3) Practice using the proven tools of successful innovation.

- ▷ **Allen Thornburgh**, Vice President, Strategic Innovation, and **Mark Neigh**, Director, Digital Media and Product Development, Masterworks  
*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*
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Thursday, April 19: 3:45 – 5:15 p.m.

### 30. Building Great Teams and High-Trust Cultures

Using well-known bestsellers such as Pat Lencioni's *Five Dysfunctions of a Team* and Jon Katzenbach/Douglas Smith's *Wisdom of Teams*, we'll move through this fast paced session to cover 30 key elements of high-functioning teams. Outcomes: 1) Recognize why high-trust work cultures are the most important key to high-functioning teams, 2) Realize that win/win thinking is the balance between collaborative and competitive teams, and 3) Apply simple, yet powerful tips to organize and strengthen your work teams.

- ▷ **Mark Siegrist**, Director of Education, Denver Rescue Mission  
*Basic*



## ▽ Resource Development

Thursday, April 19: 9:00 – 10:30 a.m.

### 31. Fundraising Breakthrough: Unleashing Donor Experience

Optimizing your donor experience is the single most important factor for achieving breakthrough success in fundraising. Learn how to map, deliver, and optimize your donor experience for today's *Experience Economy*. Outcomes: 1) Learn how to make donors feel less like cash machines and more like passionate participants, 2) Learn the three essential building blocks of donor experience that maximize donor engagement and generosity, and 3) Learn to build an experience-creation lifecycle that transforms last-century Fundraising 1.0 into breakthrough Fundraising 2.0.

- ▷ **Kn Moy**, Senior Vice President of Strategic and Applied Foresight, Masterworks  
*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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Thursday, April 19: 2:00 – 3:30 p.m.

### 32. Asking Well for Major Gift Success

Regardless the size of your donor base, there is unrealized major gift potential right at hand. What's missing is a compelling reason to give, coupled with a careful, winsome invitation to participate at a level that will stretch the giver and empower your ministry. Outcomes: 1) Hone your ability to shepherd those blessed with wealth, 2) Develop a framework for thinking about major gift work: why ask and how to ask winsomely, and 3) Gain confidence to achieve, measure, and integrate major gift solicitation into your multi-faceted duties.

- ▷ **R. Mark Dillon**, Executive VP, EVP NPO/Christian Ed., and **Jeffery Hensley**, Senior Generosity Strategist, Generis  
*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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Thursday, April 19: 3:45 – 5:15 p.m.

### 33. Equipping International Financial Sustainability

With video, case studies and wisdom from the Lausanne Ministry Fundraising Network, we will examine the practical impact of substituting “Western funding” with global fundraising in “Faith Reliance.” Outcomes: 1) Recognize the transforming impact of every believer being part of the “Great Commission,” 2) Embrace the transforming dignity and power of every global believer participating in generous giving, and 3) Apply insights on what has to happen in your organization before establishing biblical fundraising in any country.

- ▷ **Barbara Shantz**, Co-Catalyst for the Lausanne Movement's Ministry Fundraising Network  
*Basic*





## ▽ Financial Management

Thursday, April 19: 9:00 – 10:30 a.m.

### 34. Transforming Finance for Greater Impact

Has your finance team significantly impacted the success of your ministry? How would your leadership describe that impact? Learn how to increase your organizational impact by focusing your finance function on two fundamental ideas. Outcomes: 1) Define the value proposition of finance, 2) Provide simpler solutions to solve complex problems, and 3) Grow your ministry intelligence by transforming data into insight.

▷ **Mark Tjernagel, CFO, and Joe Williams, Director of Financial Planning and Analysis, Cru**

*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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Thursday, April 19: 2:00 – 3:30 p.m.

### 35. Creating Impact through Data Visualization

An in-depth look at data visualization tools to help you deliver organizational impact and financial leadership. We will explore dashboards, key performance indicators, trend analysis, and other ways to make financial data more engaging. Outcomes: 1) Select performance measurement tools best suited for various audiences in your organization, 2) Understand multiple data visualization techniques including dashboards, charts, graphs, ratios, and other metrics — along with implementation strategies, and 3) Apply insights on how data visualization can help in making decisions and achieving goals in your organization.

▷ **Tim Murphy, Principal, and Jeff Roberts, Director, CliftonLarsonAllen, LLP**

*Advanced (Focuses on the development of in-depth topic/subject area knowledge, most appropriate for seasoned professionals)*

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Thursday, April 19: 3:45 – 5:15 p.m.

### 36. Active versus Passive Investing

Recently there has been a long-term trend toward passive investing. However, finance staff and committee members should understand the implications of active versus passive investing, and the relative advantages and disadvantages of each. Outcomes: 1) Know that active versus passive investing includes not only the investment vehicles used, but also the asset allocation approach, 2) Perceive potential outcomes of active and passive investing relative to benchmarks, and 3) Recognize circumstances and market environments in which active investing may win over passive investing, and vice-versa.

▷ **Winters Richwine, Portfolio Manager, Cornerstone Financial**

*Basic*



## ▽ People Management and Care

Thursday, April 19: 9:00 – 10:30 a.m.

### 37. Teamwork: Breaking Down Silos in Your Organization

We believe Fantastic Teams exemplify a spirit of partnership and collaboration (not “me,” but “we”) to achieve shared goals and objectives within a department, across departments or organization wide. How can you create consensus, direction and momentum to establish, grow and sustain a flourishing culture? Outcomes: 1) Diagnose the health of teamwork in your organization, 2) Create a culture of cooperation to integrate work between departments, and 3) Become the CIO “Chief Integration Officer” to create mutually accountable functions in your organization.

▷ **Al Lopus**, President, *Best Christian Workplaces Institute*, and **Doug Mazza**, President & COO, *Joni and Friends*

*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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Thursday, April 19: 2:00 – 3:30 p.m.

### 38. Building Trust through Ethical Protection of Your Staff

This workshop offers best practices for well-designed and effectively implemented policies and procedures to help your team protect itself from ethical issues that threaten your impact as an organization. Outcomes: 1) Discern why ethical protection of staff enables an organization to have long-term, sustainable impact, 2) Leverage three foundations for building trust and shaping an ethical culture within your organization, and 3) Practically apply four key steps to ensure well designed and effectively implemented policies and procedures to build and maintain trust within your organization.

▷ **Nathan Salsberry**, Partner - Executive Vice President, *CapinCrouse* and **Tara VanderSande**, Staff Development Director, *Willow Creek Community Church*

*Basic*

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Thursday, April 19: 3:45 – 5:15 p.m.

### 39. Global Leadership Development

As Christian leaders and organizations, we must adopt new approaches to leadership development that embrace principles of global leadership. This workshop addresses today's lack of global competency by advocating new learning outcomes in global leadership development. Outcomes: 1) Develop the next generation of leaders to understand global issues affecting our world and leadership, 2) Apply a new biblical framework for global leadership, and 3) Provide new leadership that understands different cultural backgrounds and the global body of Christ, while demonstrating a commitment to inclusion.

▷ **Vicki Harris**, Vice President of Global HR, *Our Daily Bread Ministries*

*Advanced (Focuses on the development of in-depth topic/subject area knowledge, most appropriate for seasoned professionals)*



## ▽ Communications and Marketing

Thursday, April 19: 9:00 – 10:30 a.m.

### 40. Marketing Upgrade: Building Audience Personas

Audience personas help you develop empathy for your target audiences and filter your messaging for greater impact. Take a step closer to clear communication that compels your audience to action. Outcomes: 1) Identify your primary target audience for marketing, 2) Build a draft of your ministry's audience persona, and 3) Develop a messaging plan based on your audience persona.

▷ **Dan Kennedy**, Executive Director, Kumveka

*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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Thursday, April 19: 2:00 – 3:30 p.m.

### 41. Maximum Impact with Social Media

Are you reaching people where they are? With a message they understand? Learn to optimize and connect with the 80 percent of Americans using social media and others around the world. Outcomes: 1) Determine which social media platforms are being used by different demographic audiences around the world, 2) Apply insights from real world examples on how multiple Christian ministries are using social media to further the gospel, and 3) Move beyond the basics to optimize social media usage in your ministry.

▷ **Bill Wachel**, Chief Information Officer, Global Media Outreach

*Basic*

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Thursday, April 19: 3:45 – 5:15 p.m.

### 42. Listen and Speak through Analytics

Digital analytics is a rich marketplace of information that your audience communicates to you. But are you getting the most out of what they are telling you? Outcomes: 1) Understand what your audience is telling you through your analytics, 2) Determine which metrics will most impact your ministry and stewardship objectives, and 3) Balance the art of learning from your audience, while moving your mission forward.

▷ **Kiel Russell**, Digital Analytics Manager, Moody Global Ministries/Moody Bible Institute

*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*



## ▽ Board Governance

Thursday, April 19: 9:00 – 10:30 a.m.

### 43. Real Lessons from the Boardroom

Excellence in ministry begins in the boardroom. Board excellence leads to enhanced trust and greater missional impact. With a combined 100+ board years of service, these presenters will share what sets excellent boards apart and discuss examples of where boards have excelled and where they've fallen short. Outcomes: 1) Equip board members with resources to serve with excellence, 2) Recognize real-life situations that lead to a breakdown in board governance, and 3) Utilize sound governance practices to enhance trust and missional impact of organizations.

▷ **Dan Busby**, *President, ECFA*

*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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Thursday, April 19: 2:00 – 3:30 p.m.

### 44. Engaging the Board in Fundraising

This workshop offers practical examples for engaging nonprofit board members in recruiting people and financial support for the organization. It is based on 30 years of serving on boards, and selecting and recruiting board members. Outcomes: 1) Develop a board that is engaged in resource activation, and as a senior nonprofit executive understand what ensures engagement and success in recruiting resources, 2) Motivate board members and communicate to them regarding recruiting organizational resources, and 3) Set board expectations, and train your board on resource procurement.

▷ **Lauren Libby**, *International President & CEO, TWR International*

*Advanced (Focuses on the development of in-depth topic/subject area knowledge, most appropriate for seasoned professionals)*

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Thursday, April 19: 3:45 – 5:15 p.m.

### 45. Governing Document Review

This session will address why organizations should annually review their governing documents. Since the laws governing ministries change frequently, participants will discuss the changes necessary to remain tax exempt. Participants will also receive sample governing documents that reflect best practices. Outcomes: 1) Master reading governing documents, 2) Gain insight on applying your state's nonprofit corporation statute to your governing documents, and 3) Be able to amend your governing documents to reflect compliance with state law and the Internal Revenue Code.

▷ **Frank Sommerville**, *Attorney/Shareholder, Weycer, Kaplan, Pulaski & Zuber, PC*



## ▽ Internet and Technology

Thursday, April 19: 9:00 – 10:30 a.m.

### 46. Simple Steps to Cybersecurity

No organization is immune from cybersecurity threats, but you can be better prepared to manage them. We'll highlight the most current threats and provide helpful information to improve your cybersecurity. Outcomes: 1) Analyze and apply key learnings from recent cyber breaches, 2) Recognize and understand top vulnerabilities and threats, such as ransomware and whaling, and 3) Implement practical steps to mitigate cyber risks

- ▷ **Holly Boullion, Principal, Traina & Associates: A CapinCrouse Company**  
*Intermediate (Builds on a basic program, most appropriate for persons in a mid-level position with operational and/or supervisory responsibilities)*

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Thursday, April 19: 2:00 – 3:30 p.m.

### 47. Enjoying God's Clouds (in Technology)

It is important for ministries to stay on top of where technology is shifting, as today's cloud technologies are vital in fulfilling the Great Commission. Outcomes: 1) Be aware of applications like Office 365, Salesforce, Box.com and more coming online and expanding functionality, 2) Comprehend what's changing with AWS, Azure, Google Cloud and Managed Services that will help ministry opportunities, and 3) Recognize how Big Data, containers, serverless and similar technologies are proliferating, and why that matters for your organization.

- ▷ **Ron Fleming, CTO, CrossOlive**  
*Overview*

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Thursday, April 19: 3:45 – 5:15 p.m.

### 48. Ministry IT: Strategies & Solutions

Many ministries make costly Information Technology (IT) mistakes. These mistakes include hardware, software, and other IT strategies. In this workshop we'll look at how to overcome a few of the most common mistakes, addressing three key topics from Nick's recent book *Church IT: Strategies and Solutions*. Outcomes: 1) Apply insights that will help you save money, 2) Make decisions that will help you facilitate ministry, and 3) Implement IT strategies and solutions that will help you reduce stress.

- ▷ **Nick Nicholaou, President, MBS Inc.**  
*Overview*



# Earn Professional Credits

The Outcomes Conference 2018 offers you the opportunity to earn professional credits/points to advance your career — CCNL, CPE and CFRE.



## 1. Credentialed Christian Nonprofit Leader (CCNL)

These educational experiences offer points towards CLA's professional credential for Christian nonprofit leaders. Learn more about that program at [www.ChristianLeadershipAlliance.org/CCNL](http://www.ChristianLeadershipAlliance.org/CCNL).

To earn up to 40 of the 100 required points for a CCNL credential at The Outcomes Conference, you must be registered for the CCNL program prior to attending sessions. (Proof of completion required for points to be issued.)

### CCNL Points Offered at The Outcomes Conference 2018:

- Tuesday, April 17: **Collaborative Intensive General Session and Collaborative Roundtable: 12 Points**
- Wednesday, April 18: **Full-Day Intensive/Forum: 12 Points**
- Wednesday, April 18: **Workshops: 9 Points** (3 Points for each workshop attended)
- Thursday, April 19: **Full-Day Intensive/Forum: 12 Points**
- Thursday, April 19: **Workshops: 9 Points** (3 Points for each workshop attended)
- **General Sessions: 4 Points** (1 Point for each general session attended)

**NOTE: To acquire 40 Points towards CCNL, an individual registered in the CCNL program must attend in full:**

1. Tuesday, April 17: **Collaborative Intensive General Session and Collaborative Roundtable: 12 Points**
2. Wednesday, April 18: **Full-Day Intensive/Forum: 12 Points**
3. Thursday, April 19: **Full-Day Intensive/Forum: 12 Points**
4. **General Sessions: 4 Points** (1 Point for each general session attended)





## 2. CPE: Continuing Professional Education Credits

Christian Leadership Alliance is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit.

Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.learningmarket.org](http://www.learningmarket.org).

*For information on administrative policies (including complaints and refunds), contact Suzy West at CLA, telephone (949) 487-0900, ext. 112. All sessions will be group live and require no advanced preparation.*

Credits:

- **General Sessions: 1 credit, total of 4 credits available**
- **Collaborative Intensive General Session and Collaborative Roundtable: 6 credits**
- **Full-Day Intensives and Forums: 6 credits**
- **Workshops: 1.5 credits each, total of 9 credits available**



## 3. CFRE: Certified Fund Raising Executive International Points

Full participation at The Outcomes Conference is applicable for more than **20 points** in Category 1.B-Education of the CFRE International application for initial certification and/or recertification.

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