Building Effective, Strategic, and Mission-Driven Boards
JOIN THE DODGE BOARD LEADERSHIP LEARNING COMMUNITY

YOU BECAME A NONPROFIT LEADER OR BOARD MEMBER BECAUSE YOU BELIEVE IN YOUR ORGANIZATION’S MISSION AND IN GIVING BACK TO YOUR COMMUNITY.

At the Dodge Foundation, we believe nonprofit staff and boards need to spend time tending to their mission and intentionally reflecting and learning about the issues that matter most to them to maximize impact and build a healthy and strong nonprofit. In alignment with Dodge’s recently adopted strategic plan envisioning an equitable New Jersey, our Board Leadership Series now explores how we can support the capacity building efforts of nonprofit staff and boards to value diversity, equity and inclusion as an important part of their organizational culture and board leadership. The Dodge Board Leadership series is designed to ensure that staff and board teams carve out invaluable focused time and gain new tools to help develop effective, strategic, and mission-driven boards.

What Participants Are Saying...

“Though board governance can be learned about in books and blogs, the Dodge Board Series provides a unique platform of workshops and support for individual organizations to formulate their own strategies and action plans.”

“I brought three new trustees who have just joined the Board. It helped inform them on how to focus their efforts and be more effective.”

“I learned the importance of Diversity, Equity, and Inclusion and that knowledge alone is not enough. Intercultural competency is a muscle you have to develop—I was glad to gain tools that I can take back to my colleagues.”

“These workshops provided great networking with other New Jersey nonprofits. The peer-based days are extremely useful for sharing information with similar nonprofit organizations on similar issues.”

This FREE series requires a significant commitment from both staff and board. Each organization can send a minimum of two and up to three participants for the in-person workshops. Your team including the executive director and board president must commit to attending all seven Foundational Workshops to participate in the leadership series and for your organization to qualify for a “Day of Clarity” Retreat upon completion of the series. One additional board member may attend Foundational Workshops, and this spot may rotate depending on the topic. The webinars are open to all staff and board.

Please register your organization’s team for all workshops by October 10, 2019. Each workshop is limited to about 30 participants and will fill up quickly. Registration does not guarantee participation in the series; your team will receive a final confirmation email if accepted.

LEARN MORE AND REGISTER at grdodge.org/board-leadership-series. If you are viewing this as an electronic brochure, you may click the link on the workshop dates for direct links to each workshop registration.
We’ve developed a proven, three-tiered process that creates opportunities for board members and staff to learn and build pathways to apply and deepen their learning with others.

**START with FOUNDATIONAL WORKSHOPS**

1. Getting Started: How Good Organizations Get Better
2. Board Bootcamp
4. Board’s Role in Fundraising
5. Leading for High Impact (Part 2): Creating a Culture of Equity
6. Recruiting and Retaining Effective Board Members
7. Turning Learning into Action

**CONTINUE with WEBINARS**

1. Achieving Financial Resilience
2. Building a Strategic Planning Process that Works

**PRACTICE with ACTION LEARNING TOOLS**

1. Apply for a matching grant to receive a “Day of Clarity” Retreat
2. Share learning with our online Video Toolkit
3. Navigate a real-time challenge with “Just in Time” consulting
4. Connect with fellow leaders through our virtual “In Good Company” Learning Circles
Foundational Workshops are all mandatory. Breakfast and lunch are provided at these workshops, which are held in locations which are ADA accessible. Send a team of three to all seven of the following workshops:

1. **Getting Started: How Good Organizations Get Better**  
   **FACILITATED BY DAVID GRANT, FORMER PRESIDENT AND CEO OF THE GERALDINE R. DODGE FOUNDATION**

   This full-day workshop led by Dodge’s former President and CEO sets the stage for the entire Board Leadership series by exploring essential questions of organizational development, culture, and performance.

   David will give an overview of the mutually-reinforcing tasks that organizations have to “get right” in order to be effective in pursuing their missions: leadership, management, program design, financial sustainability, culture, and assessment -- all integrated by the values and practices of diversity, equity, and inclusion. Then he will focus on two foundational mental models: nonprofit lifecycles, which helps explain the predictable challenges that nonprofit staff and board members face as they grow and evolve, and formative assessment, which encourages us how to plan backwards from a vision of success, and create ways to “measure what matters” most to your organization. We will treat change as something we design, rather than something that happens to us, and try to model an approach to creating a learning culture that will help your organization prepare for the transformative impact of the workshops to follow.

   **SUNDAY, OCTOBER 26, 2019**
   10:00 am - 4:00 pm  
   (check-in is 9:30 am)
   Geraldine R. Dodge Foundation
   14 Maple Avenue
   3rd Floor
   Morristown, NJ

2. **The Board Bootcamp**  
   **FACILITATED BY LAURA OTTEN, DIRECTOR OF THE NONPROFIT CENTER AT LA SALLE UNIVERSITY**

   The Board Bootcamp provides a definitive foundation of best practices for effective and satisfying nonprofit board participation. This full-day, interactive experience will deliver a comprehensive overview to help new and seasoned board members increase their capacity to be purposeful and fulfilled leaders. Content will include an overview of board roles and responsibilities, legal liability, fundraising, financial management, board development, strategic planning, and the board’s relationship with the executive director. This workshop touches on every area of governance your board needs to excel and will help your team target areas to focus on for the rest of the series.

   **SUNDAY, NOVEMBER 16, 2019**
   10:00 am - 4:00 pm  
   (check-in is 9:30 am)
   Geraldine R. Dodge Foundation
   14 Maple Avenue
   3rd Floor
   Morristown, NJ
   Snow Date: Tuesday, November 19, 2019
Leading for High Impact (Part 1): The Critical Role of Diversity, Equity, & Inclusion
FACILITATED BY BETH ZEMSKY (PRINCIPAL OF ZEMSKY & ASSOCIATES CONSULTING, LLC) AND LADONNA REDMOND (INTERCULTURAL ORGANIZATIONAL DEVELOPMENT CONSULTANT AND COACH WITH COLUMINATE)

As the policy-making entity at the highest level of organizational leadership, boards play a critical role in creating an organization’s values-driven culture. Whether hiring the executive director or determining the allocation of resources, the board’s leadership on diversity, equity, and inclusion (DEI) is critical to effective board functioning and serving the diverse communities of New Jersey. This workshop will help attendees understand how DEI issues influence organizational culture and increase mission-impact. Through a highly engaging day of exploration, participants will understand how diversity, equity, and inclusion play out at interpersonal and organizational levels, study and reflect on models to develop more competency to interact across differences, and explore an actionable next step. This workshop is suitable for beginners and more experienced learners alike.

The Board’s Role in Fundraising
FACILITATED BY ALLISON TRIMARCO, CONSULTANT AT THE NONPROFIT CENTER AT LA SALLE UNIVERSITY

Promoting a nonprofit’s impact is a major role for every board member, and this often includes identifying and cultivating donors. Participating in fundraising often feels like a challenge, however, and can become a point of tension between board and staff. This full-day workshop provides board members with a greater understanding of how fundraising actually works and offers tools to build board confidence and participation. We’ll cover current trends in philanthropy, options for organizing board fundraising work, and skills in cultivating and soliciting gifts both large and small. The board/staff teams that attend will leave with new ideas about how to engage the whole board in fundraising, and action steps for sharing what they have learned with the rest of the board.
5 Leading for High Impact (Part 2): Creating a Culture of Equity
FACILITATED BY BETH ZEMSKY (PRINCIPAL OF ZEMSKY & ASSOCIATES CONSULTING, LLC) AND LADONNA REDMOND (INTERCULTURAL ORGANIZATIONAL DEVELOPMENT CONSULTANT AND COACH WITH COLUMINATE)

Building on the first Leading for High Impact workshop, this workshop will dig deeper into how boards can support creation of an organizational culture that reflects their diversity, inclusion, and equity values and goals. Through a highly interactive and experiential session, participants will explore how to align intent and impact related to interpersonal relationships and issues of accountability with each other, clients, constituents and community members; explore types and sources of individual, institutional, and systemic power, and discuss systems change and change management strategies through an equity lens.

6 Recruiting and Retaining Effective Board Members
FACILITATED BY LAURA OTTEN, DIRECTOR OF THE NONPROFIT CENTER AT LA SALLE UNIVERSITY

It’s an ongoing challenge to build a board of qualified individuals who bring the appropriate skills, temperament, expectations, and passion to the organization while also ensuring that the board is reflective of the constituency you serve. Once you have strong board members, how do you keep them motivated and content? This full-day workshop will provide practical tools to help design a culture of board assessment and development that fuels healthy organizations. Participants will learn how to monitor and build their boards’ profiles in terms of skill, experience, expertise, and demographics; explore strategies to recruit new board candidates; develop effective board member orientation; manage officer and committee chair succession and board performance appraisals; and run productive meetings.
Turning Learning into Action
FACILITATED BY DAVID GRANT (FORMER PRESIDENT & CEO OF DODGE FOUNDATION) AND BETH ZEMSKY (PRINCIPAL AT ZEMSKY & ASSOCIATES CONSULTING, LLC)

This closing workshop synthesizes the learning from the previous workshops and provides practical steps for incorporating those learnings into the governance and day-to-day lives of our organizations. We close the series with a bias toward action in integrating diversity, inclusion, and equity into organizational strategy and culture while focusing on leadership, management and governance, and organizational excellence. We will discuss how change happens - and why it often doesn’t happen - and decide what principles and tools will be most useful to our individual organizations. And we leave with a clear vision with what success will look like for each of us in the years ahead and the ways we can support each other in achieving it.
Webinar topics are covered over two sequential sessions and we strongly recommend registering for both. Webinars are not required for “Day of Clarity” eligibility.

1 Achieving Financial Resilience
FACILITATED BY HILDA POLANCO, FOUNDER AND CEO OF FISCAL MANAGEMENT ASSOCIATES, LLC

Organizations that are financially resilient have a comprehensive understanding of their financial health and are able to strategically anticipate future needs. In this two-part webinar series, we will explore the values, resources, and practices that are foundational to building a financially resilient organization. The webinars will cover: culture of inclusion, transparency, and team-based decision-making process; multi-year planning, scenario planning, and ongoing financial performance management; balanced revenue mix and appropriate capital structure; and building and maintaining adequate operating reserves, better known as Liquid Unrestricted Net Assets (LUNA). Requirements for this session include some pre-reading as well as a self-reflection assignment to be completed between the webinars.

Part 1
**THURSDAY, FEBRUARY 6, 2020**
12:00pm-1:15pm

AND

Part 2
**THURSDAY, FEBRUARY 13, 2020**
12:00pm-1:15pm
Webinar links provided prior to each part.

2 Building a Strategic Planning Process that Works
FACILITATED BY ALLISON TRIMARCO, CONSULTANT AT THE NONPROFIT CENTER AT LA SALLE UNIVERSITY

Strategic planning documents are valuable, but it’s the actual planning process that really makes a difference in the quality of the end product. How can you be sure that the time you spend building a strategic plan will provide you with the information you need to make good decisions in the coming years? This two-part webinar will help you decide how to structure your planning process for maximum effect. Topics covered will include different approaches to strategic planning, methods for gathering data to inform decision-making, ways to engage stakeholders effectively, and strategies for prioritizing goals and objectives. If your organization does not have a strategic plan (or is using an outdated plan), this webinar will get you ready to tackle the process.

Part 1
**THURSDAY, MARCH 5, 2020**
12:00pm-1:15pm

AND

Part 2
**THURSDAY, MARCH 12, 2020**
12:00pm-1:15pm
Webinar links provided prior to each part.
It can be challenging to bring training tools and learning back to the full board without support mechanisms. So, upon completion of the workshop series, grantee organizations are eligible for a variety of options for ongoing capacity building.

**1. “DAY OF CLARITY” RETREAT**

**2. BOARD LEADERSHIP TOOLKIT**

**3. JUST IN TIME CONSULTING**

**4. IN GOOD COMPANY LEARNING CIRCLES**

**ACTION LEARNING TOOLS:** grdodge.org/board-leadership-series/actionlearningtools

Read descriptions on the next page and click on each title for links to more information.
“DAY OF CLARITY” BOARD RETREAT
This full-board training grant opportunity, adapted from the La Salle Nonprofit Center’s successful retreat model, is designed to help boards focus on developing effective strategic practices and outcomes as well as new skills to fulfill their organization’s mission and goals with confidence. After the grantees complete all the Foundational Workshops, they will be invited to apply for a matching grant to bring one of our faculty to lead a “Day of Clarity” retreat for the full board. Each eligible organization will be required to provide $500 in matching dollars, preferably raised by the organization’s Board of Directors, to complement the $3,000 Dodge grant award for the “Day of Clarity.” All of the “Days of Clarity” will include some pre-planning time with the consultant, a full-day training, and a short follow-up report on the retreat’s key findings and suggested next steps.

BOARD LEADERSHIP VIDEO TOOLKIT
Did the board workshop facilitator lead an exercise that you wanted to share with your fellow board members? Don’t fret. Upon completion of each workshop, you will gain access to related videos and companion worksheets that your board members can use to guide the full board through select strategic exercises.

JUST IN TIME CONSULTING
We know it is difficult to figure out where to turn for answers to finite questions that don’t require a consulting project, but nevertheless do need objective expert input. During and after completing the series, your organization will have access to “Just in Time” consulting designed to provide free timely guidance about a specific question or issue that can be reasonably addressed in a one to two-hour consulting conversation with a Dodge Board Leadership series faculty member.

“IN GOOD COMPANY” LEARNING CIRCLES
FACILITATED BY LAURA OTTEN AND LARRY CAPO
You have the tools in your toolkit; now the challenge is to apply them to your day-to-day practices. These professionally-facilitated “In Good Company” Learning Circles offer nonprofit executive directors and board presidents, who have completed the 2019-20 Board Leadership series, additional in-depth practical training, invaluable peer support, problem-solving strategies, and coaching. They also provide new insights in a supportive and confidential environment that enable participants to benefit from each other and share experiences that they would unlikely raise with co-workers or fellow board members. Eligible executive directors and board presidents will receive an invitation after the series.
DODGE BOARD LEADERSHIP FACULTY

Larry Capo is the former president & CEO of Young Audiences New Jersey & Eastern Pennsylvania. He has held leadership positions in statewide arts education and arts organizations, higher education, regional theatre and nationally recognized architectural firms. Larry served on the Board of Trustees of Young Audiences New Jersey & Eastern Pennsylvania, Art Pride New Jersey, and currently serves as president of the New Jersey Theatre Alliance and chair of the Creative New Jersey steering committee.

David Grant is former president and CEO of the Geraldine R. Dodge Foundation and architect of an assessment training program for Dodge grantees, which has evolved into the current series of workshops. He now lives in Vermont and consults with mission-based organizations around the world. David holds a BA in English from Princeton University and an MA in American Studies from the University of Michigan.

Laura Otten has been the director of The Nonprofit Center at La Salle University's School of Business since 2001 and is the first director of La Salle's Master in Science in Nonprofit Leadership Program. An associate professor in the University’s Sociology, Social Work, and Criminal Justice Departments, she began her affiliation with The Nonprofit Center shortly after it was formed in the early 1980s, working as a consultant and trainer, primarily in the areas of board development, strategic planning and program evaluation.

Hilda Polanco (CPA, CCSA, CGMA) is the founder and CEO of Fiscal Management Associates, LLC, a consulting firm focused on helping nonprofits address financial management issues. Prior to founding FMA in 1999, Hilda worked with Citigroup and previously with the firm of Ernst & Young, serving Fortune 100 companies in various industries. Hilda holds the Certification in Control Self-Assessment from the Institute of Internal Auditors, in addition to holding the Chartered Global Management Accountant designation.

LaDonna Redmond is an Intercultural Organizational Development Consultant and Coach with Columinate and a Qualified Administrator (QA) of the Intercultural Development Inventory (IDI). She is the former Diversity and Community Engagement Manager for the Seward Co-op in Minneapolis, MN and led the co-ops diversity and engagement initiatives that contributes positively to organizational culture, marketplace competitiveness, and social responsibility. LaDonna is a community activist who has worked on several public health issues throughout her career such as substance abuse, violence and food justice.
**Dodge Board Leadership Faculty (Cont’d)**

**Allison Trimarco** is the founder of Creative Capacity, LLC, which helps nonprofit organizations increase their management capacity and mission effectiveness. Prior to beginning her consulting practice, she held leadership positions at nonprofit theatres, public libraries, and public television. Allison serves as an instructor and consultant at The Nonprofit Center and is also an adjunct faculty member at both Drexel University and La Salle University.

**Beth Zemsky** (MAEd, LICSW) comes to her work out of her continued commitment to engage people in learning activities that move them to understand critical social and cultural issues. Beth has over 35 years of experience working as a consultant, community organizer, psychotherapist, educator, and organizational leader including serving as the principal of Zemsky and Associates Consulting, founding Director of the GLBT Programs Office, Supervisor of the Diversity Institute, and Coordinator of Leadership Development & Organizational Effectiveness at the University of Minnesota.

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**More resources online!**
The Dodge Blog tackles a new Technical Assistance topic each month and has a robust library of blogs on a wide range of topics.

[blog.grdodge.org](http://blog.grdodge.org)

The Dodge Resource Library offers sample governance policies, evaluation tools and more:

[grdodge.org/board-leadership-library/](http://grdodge.org/board-leadership-library/)

**Get social!**
Share what you’re learning on social media using:

#dodgeTA

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**Questions?**
We want to hear from you!

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