MENDOZA COLLEGE OF BUSINESS

Nonprofit Executive Programs

AN EXECUTIVE PROGRAM FOR CATHOLIC LEADERSHIP

JULY 9-16, 2016
Saturday, July 9, 2016

OPENING RECESSION

7:00 - 9:00 PM

The Morris Inn at The University of Notre Dame

Drinks and appetizers will be served
Sunday, July 10, 2016

12:00 - 1:00 PM  |  Lunch in the Giovanini Commons

1:00 - 4:30 PM  |  Strategic Planning

**Presenter:** Mark Germano, President, Creating Solutions

We’ve often heard the term “strategic planning,” and we may have actually said, “we really need to put together a strategic plan for our organization.” However, it may not always be clear how a well-constructed plan can improve the effectiveness of a not-for-profit organization. For example, what happens if it leads to significant growth in revenue, service and the ability to achieve the organization's mission? This session deepens the participants’ understanding of strategic planning, how to begin the planning process and factors necessary to successfully implement a strategic plan. This will be an interactive, practical hands-on session.

**Mark Germano** is a seasoned nonprofit executive with more than 30 years of experience, both in working for nonprofit organizations as well as consulting in the industry. He has raised more than $650,000,000 in his career, and he consistently builds strong donor relationships with high net-worth individuals, corporate and civic leaders. He has been an innovator in the nonprofit industry by introducing such things as online giving, implementing program outcome measurements into the development efforts and building effective strategies to work with a wide range of donors. Mark has held leadership roles at the local, regional, state and national levels in a variety of organizations, including social services, education, faith-based and voluntary health organizations.

4:45 - 5:45 PM  |  Campus Tour

Monday, July 11, 2016

8:00 - 8:30 AM  |  Continental Breakfast in the Giovanini Commons

12:00 PM  |  Group Photo

8:30 AM - 4:30 PM  |  Fund Development

**Presenter:** Mark Germano, President, Creating Solutions

Every nonprofit organization in the world relies to a greater or lesser extent on philanthropic contributions. The U.S. has more than 1,800,000 501(c)3 organizations, and the number is climbing. This session will give you practical, straightforward tools and techniques that you can implement immediately to help you create a philanthropic culture. This will be an interactive session where participants will be exposed to the latest research on donor giving patterns and motivations, and what nonprofits must do to create alignment between the donor and their organization.
Tuesday, July 12, 2016

8:00 - 8:30 AM | Continental Breakfast in the Giovanini Commons

8:30 AM - 4:30 PM | Governance of Roman Catholic Religious Corporations: Canon and Civil Law 101

**Presenter:** Sister Melanie Di Pietro, Director of Seton Hall University Law School Center for Religiously Affiliated Corporations, Seton Hall University

Participants are invited to bring a sample of the bylaws of the corporation which is their primary interest. Time permitting, the presenter will use samples from the participants to illustrate an application of principles from the presentation.

The first session will present an introduction of the governance structure of a public juridic person in canon law and a public charitable corporation in American Law and explain the fundamental differences in the decision making processes in canon law and American corporate law. The use of American law to implement principles of canon law will be illustrated in selected provisions of the Articles and bylaws of a corporation carrying on the educational and charitable works (apostolate) of the diocese or religious institute.

**Sister Melanie Di Pietro** is a Sister of Charity of Seton Hall in Greensburg, Pa. She received her law degree from Duquesne University and her doctorate in canon law from the University of St. Thomas in Rome. She also is a trained mediator. Prior to her current position as special legal counsel and advisor at CCUSA, Sister was the Distinguished Practitioner in Residence professor and founder of the Seton Center for Religiously Affiliated Nonprofit Organizations at Seton Hall Law School, Newark NJ. Sister was a shareholder at Buchanan Ingersoll and Rooney in Pittsburgh, with her practice concentrating in governance, transactions (including joint ventures) and litigation involving healthcare, social service and educational organizations. She has extensive experience in the development of legal structures that integrate the principles of canon law relevant to Roman Catholic organizations. Sister is an elected member of the American Law Institute and serves on the consultant group for Principles of Nonprofit Governance. She has served on numerous community boards and currently is a member of the Legal Commission of Caritas Internationalis. She has been a consultant both nationally and internationally concerning governance of religiously affiliated organizations, including multi-corporate systems.
Wednesday, July 13, 2016

8:00 - 8:30 AM  | Continental Breakfast in the Giovanini Commons

8:30 AM - 4:30 PM  | Program Evaluation and Capacity Building

Presenter: Sal Alaimo

Presenter: Sal Alaimo, Assistant Professor, School of Public, Nonprofit and Health Administration, Grand Valley State University

Today's nonprofit organizations are being evaluated in order to demonstrate their programs' effectiveness. This workshop helps nonprofit leaders prepare their organizations for the evaluation process as it relates to leadership, organizational culture, resources, structures and organizational context. Organizations that embrace the evaluation process tend to save resources, increase the quality of their evaluations, and prepare their organizations for long-term engagement in program evaluation.

Sal Alaimo has a Ph.D. in Philanthropic Studies from Indiana University and a master's degree in Urban Studies/Nonprofit Management from Georgia State University. Alaimo has worked for nonprofit organizations for nine years and has consulted with nonprofits for 10 years, specializing in evaluation, strategic planning and volunteer management. His most recent publications include the book chapters "Nonprofits and Evaluation: Managing Expectations from the Leader’s Perspective" in the Jossey-Bass Reader on Nonprofit and Public Leadership, and “Contracting out” in the Handbook of Research on Nonprofit Economics and Management.

Thursday, July 14, 2016

8:00 - 8:30 AM  | Continental Breakfast in the Giovanini Commons

8:30 AM - 12:00 PM  | Nonprofit Marketing

Presenter: Joe Urbany, Professor, University of Notre Dame

This course will introduce marketing concepts and strategies typically thought to apply only to the for-profit sector. Potential discussion topics include branding and the importance of protecting brand, controlling the message to your markets, segmenting markets, and consumer input.

Joe Urbany is a professor of Marketing in Notre Dame’s Mendoza College of Business. He earned his Ph.D. at The Ohio State University. His research focuses on buyer behavior, information search, managerial decision-making, and competitive strategy. His research has appeared in:

- The Journal of Consumer Research
- The Journal of Marketing, Marketing Science
- Harvard Business Review
- The Journal of Retailing
- The Journal of the Academy of Marketing Science
- The Journal of Economic Psychology
- The Journal of Behavioral Economics

Joe's work has been cited in U.S. News and World Report, USA Today, MSNBC, the Wall Street Journal, and in other international media. His research has received several distinctions, including the Davidson Award for best paper by the Journal of Retailing in 2002 and he has consulted and conducted executive education programs for a wide variety of organizations and state governments. Previously he was associate dean of Graduate Programs in the Mendoza College of Business. Professor Urbany has won teaching awards at both The Ohio State University and the University of South Carolina. He has also served as a fellow for the Kaneb Institute for Teaching Excellence at Notre Dame.
1:00 - 4:30 PM | Budgeting and Finance

Presenter: Ed Hums, Professional Specialist, University of Notre Dame

This presentation provides very practical and fundamental aspects to accounting and budgeting in order to assist managers in analyzing departmental revenues and expenses, as well as how to create a budget. Discussion topics include:

- Concepts of accrual and cash-basis accounting
- Regulatory accounting matters
- Financial reporting issues
- Why cash flow is important
- How to assemble a budget, analyze and interpret budget variances
- Financial and regulatory audits, and related issues.

Ed Hums holds a BBA from the University of Notre Dame, both an MBA and MSBA from Indiana University, and is a CPA in Indiana. His expertise lies in the areas of budgeting, accounting information systems and nonprofit financial management. Ed is in his 23rd year of teaching at Notre Dame with the last 10 years as a full-time faculty member.

Friday, July 15, 2016

8:00 - 8:30 AM | Continental Breakfast in the Giovanini Commons

8:30 AM - 4:30 PM | Employment Law

Presenter: Barbara Fick, Professor, University of Notre Dame Law School

Barbara Fick will review the major federal and state laws affecting employment. The session will begin with an analysis of the basic principle of employment-at-will and the public policy and implied contract exceptions. Next will be an examination of federal anti-discrimination law (NLRA, Title VII, ADEA and the ADA) and leave laws (USERRA and FMLA). The session will conclude with an overview of state leave laws and anti-retaliation provisions in employment laws.

Barbara J. Fick joined the Notre Dame Law School faculty in 1983 as a visiting associate professor of law, and became a permanent member of the faculty one year later. She earned her B.A. from Creighton University and her J.D. from the University of Pennsylvania. A member of the Wisconsin Bar since 1976, Professor Fick has worked as an associate at the Milwaukee firm of Foley & Lardner and as a field attorney for the National Labor Relations Board in Philadelphia. While at the NLRB, she also lectured in law at St. Joseph's University in Philadelphia. Professor Fick's teaching and scholarship concentrate on various aspects of labor law such as employment discrimination, individual rights in the workplace, and international and comparative labor law. Since 1995, she has worked with the American Center for International Labor Solidarity advising and teaching trade union leaders in Central and Eastern Europe on issues relating to protecting worker rights and ensuring domestic compliance with international labor standards. In the spring semester of 2000, Professor Fick served as a visiting professor of law at Katholieke Universiteit Leuven, Belgium.

6:00 PM | Banquet
Saturday, July 16, 2016

8:00 - 8:30 AM  |  Continental Breakfast in the Giovanini Commons

8:30 AM - 12:00 PM  |  Nonprofit Board Governance: A Design for Quality

**Presenter:** Thomas Harvey, The Luke McGuinness Director of Nonprofit Professional Development, University of Notre Dame

Prior to this session, Thomas Harvey will survey all the participants in the Catholic Leadership Program on issues facing their individual nonprofit boards. Specific information will be kept confidential, but the material will be summarized into an agenda for this session to maximize the value of the class. Participants are encouraged to share successes, problems, current challenges or structural concerns in filling out the survey. If time permits, you will have the opportunity to work in teams to develop solutions to the identified problems, and to determine how successful board dynamics can be replicated in all participating agencies.

**Thomas J. Harvey** is an internationally recognized leader in social welfare, and co-author of the recently published book, *Nonprofit Governance*. Over the course of his 40-year career, he has led local and national organizations committed to confronting the challenges of poverty, discrimination, health care and human services. In October 2003, he was chosen by the Council on Social Work Education as one of the 50 pioneers in the field of social work, and was highlighted in its publication *Celebrating Social Work: Faces and Voices of the Formative Years*. From 1998 to 2005, Tom served as the senior vice president of the Alliance for Children and Families, a Milwaukee-based international association of more than 300 private, nonprofit child-and family-serving agencies that strengthen the lives of over five million disadvantaged families annually. Earlier in his career, he served as president and CEO of Catholic Charities USA, one of the nation’s largest networks of social service organizations. Tom retired in June, 2016 as the director of a special master degree program for nonprofit leaders at the University of Notre Dame’s Mendoza College of Business.

12:00 PM  |  Program is Adjourned

**HAVE A SAFE TRIP HOME!**
University of Notre Dame
Nonprofit Executive Programs
Celebrating Over 60 Years of Impact

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