

1-DAY LEARNING RETREAT

AGENDA OVERVIEW & LEARNING OBJECTIVES

Subject to revision based on results of
Participant Survey

Friday, October 19, 2018, Petaluma Sheraton, gathering at 8:30 AM

9:00 AM:

Opening Greeting, Set up, Overview & Introductions
Introduction of the Mentor Panel

- Pam Chanter – Board member, business leader, recognized philanthropic leader
 - The Donor’s Point of View
 - Approaching Life-Changing Projects
- Cheryl Parkinson -- experienced Executive Directors / Change Leader; E.D. of The Living Room
 - Leading Bold Change
 - Vision and Action for Awesome Impact
- José Guillén – Former Courts Administrator, organizational consultant, NPO leader
 - Effective relationships with Boards & Decision-makers
 - Governance and Leadership during Crises

Questions and interaction with Panel

- Open with comments and learning
- Address moderated questions from the audience

LUNCH and Conversation: ‘Reading’ and Responding to others – Time for conversation

Small Group Learning Options – revolving topics

Special topics based on participant interest -- examples:

- Motivating Volunteers
- The Board / Management Relationship
- How to Use a Retreat
- Management Resources for YOU
- Donor relationships
- Crisis Communication
- Press & Public Relations

Confidence for a Cause: Be irresistible!

Presented by communication trainer Maureen Merrill

- Communication skills for powerful persuasion and leadership awesomeness
- Opportunities for voluntary practice and supportive coaching

4:30 (approximate)

4:45 – 5:00 CLOSING, followed by Networking Hour*

*Guests welcome to join Networking

LEARNING OBJECTIVES

Subject to adaptation to results of
Participants’ Survey

1. Identify shared concerns among peers, specific questions and knowledge gaps; sharpen focus on what information is needed for better performance
2. Learn about problem-solving approaches recommended by tested, successful leaders
3. Gain greater understanding of:
 - how donors view and evaluate an organization
 - relationships with boards, and the ED/CEO role in board effectiveness
 - local networking resources – through peers and experts
 - techniques for confident communication, and motivation, about a social cause or urgent community need to decision-makers, supporters, opponents, clients, team members and the public.
4. Identify ideas and actions applicable to everyday work and the accomplishment of our mission
5. Create openings for unexpected insights, revelations and personal reflection
6. Increase ability to positively influence and motivate others
7. Action pieces: Clarify commitments, if any, to change, improvement, or initiation of inquiries for possible projects and larger goals.