**Monday, October 12**

**8:00 – 9:00am  Opening Session**  
*Nancy J. Love, MPA, Director, Nonprofit Management Program, (A unit of the Duke Office of Continuing Studies)  nl40@duke.edu  
Matthew T.A. Nash, Managing Director, Social Entrepreneurship, Duke Innovation & Entrepreneurship Initiative, mnash@duke.edu*  

Following a welcome by program leaders, introductions, and an on-boarding activity, we will discuss participants’ expectations for the Executive Certificate in Nonprofit Leadership and identify norms and standards for our learning community. We will conclude with an overview of the curriculum with special reference to the expectations identified earlier.

**9:00 – 10:15am  Effective Leadership and the Nonprofit Executive**  
*Matthew T.A. Nash, Managing Director, Social Entrepreneurship, Duke Innovation & Entrepreneurship Initiative*  

In this session, we will engage in a lively discussion of what leadership means for each of us. Together, we will examine the special challenges of leadership in the nonprofit sector. Finally, we will share the leadership development goals that each of us bring to the Executive Certificate program.

**10:15 – 10:30am  BREAK**

**10:30am – 12:00pm  Promising Practices of High-Impact Nonprofits**  
*Matthew T.A. Nash, Managing Director, Social Entrepreneurship, Duke Innovation & Entrepreneurship Initiative*  

Nonprofits occupy a unique position in the organizational landscape of the United States. Although many of the fundamental principles and practices of effective leadership apply across all sectors and forms of organization, nonprofit leaders face a distinctive set of opportunities and challenges in comparison with their counterparts in the business and government sectors. Moreover, recent research has revealed a set of promising practices applied consistently to positive effect in many high impact nonprofits.
Key Learning Objectives:
1. Engage in an interactive discussion of what leadership means for participants, and the special challenges of leadership in mission-driven organizations.
2. Consider how nonprofit leaders can implement internal and external practices aimed at improving the effectiveness with which the organization achieves its mission.

12:00 – 1:15pm  LUNCH

1:15 – 3:15pm  The Landscape of Leadership
Oie Osterkamp, Executive Director of Ronald McDonald House, Durham, NC, oie.osterkamp@rmhdurham.org

What does it take to be a leader? A good starting place is an examination of personal learning and leadership styles and their effect on decision-making, problem solving, and communication. Each participant will complete the DISC or Myers Briggs profiles. We will then examine these frames and what they suggest about improving leadership capabilities for ourselves and for those we lead.

- Take the Meyers-Briggs profile free at http://www.16personalities.com

Key Learning Objectives:
1. Use results from the inventory to understand personal learning and leadership style.
2. Understand the variety of frames present within an organization and appreciate the value such diversity brings to leadership.
3. Be able to use each learning/leadership style in developing approaches to leadership behaviors, problem solving, decision-making, and communication.

3:15 – 3:30pm  BREAK

3:30 – 5:30pm  Entrepreneurial Leadership
Christopher Gergen, Cofounder of Bull City Forward, Lecturer, Enterprising Leadership Initiative, Hart Leadership Program, Duke University Sanford School of Public Policy, cgergen88@gmail.com

Today's nonprofit organizations cannot compete without the entrepreneurial edge. Is your team ready? Entrepreneurial leaders seek to integrate their life, work, and purpose through distinctively entrepreneurial behavior—and, in so doing, create extraordinary lives of significance. Are YOU ready? In this session, the co-author of Life Entrepreneurship: Ordinary People Leading Extraordinary Lives will coach participants through the entrepreneurial path, including awakening to opportunity, envisioning the future, developing entrepreneurial goals and strategies, and taking action and making a difference. We will provide vivid examples, frameworks, and strategies for helping participants create a life of service and fulfillment.

Key Learning Objectives:
1. Gain deeper sense of personal leadership development by embracing the entrepreneurial mindset
2. Opportunity for reflection and renewal
3. Opportunity for performance acceleration on the personal and professional front
4. Gain better understanding of the entrepreneurial process with a specific focus on Theory of Change

5:30 – 5:45pm  **Overview of Breakout Groups**  
*Matthew T.A. Nash*, Managing Director, Social Entrepreneurship, Duke Innovation & Entrepreneurship Initiative

6:00 – 7:00pm  **DINNER**

7:15 – 8:45pm  **Breakout Groups**

**Tuesday, October 13**

8:00 – 8:15am  **Morning Check-In Session**  
*Love & Nash*

8:15am-10:15am  **Collaborative Leadership**  
*Sanyin Siang*, Executive Director of the Coach K Leadership & Ethics Center (COLE) at Duke’s Fuqua School of Business, sanyin.siang@duke.edu

As the social impact landscape becomes more interdependent and complex, collaborations between private and social sectors as well as among nonprofits and within organizations will be the key to success. This session explores ways of communicating the context for collaboration, building and cultivating trust through presentation, dialogue, and experiential exercises.

**Key Learning Objective:**
- Embrace the skills and mindset of collaborative leadership as an imperative in seeking to achieve increased impact in your community.

10:15 – 10:30am  **BREAK**

10:30 – 12:00pm  **Managing Strategic Change**  
*Oie Osterkamp*, Executive Director of Ronald McDonald House, Durham, NC, oie.osterkamp@rmhdurham.org

Nonprofit leaders face unprecedented challenges and emerging opportunities as they engage their organizations in preparing for the future. Nonprofit leaders must seek to bring about change every day—change in their teams, organizations, and communities—but implementing change is downright difficult, as any seasoned leader would agree. In this session, we will consider the management tactics required to create and communicate a vision for change, structure an effective process of managing change, identify and work with change agents, prepare affected individuals to embrace change, and drive the change effort to a successful conclusion that results in the increased impact of the organization.
We will learn the formula for building an effective team, discuss questions that can help an organizational leader assess the health of their team and identify areas where change is necessary, and will discuss tactics that can help mitigate possible pitfalls that organizations can experience as they change or grow.

Key Learning Objectives:
1. Understand and be able to apply the formula for building high performing teams.
2. Understand and be able to apply strategies from First Break All The Rules by Marcus Buckingham and other resources.
3. Be able to use particular tools and tactics in personal leadership, board/staff leadership, or change management behaviors.

12:00-1:15pm  LUNCH

1:15 – 3:15pm  Managing Strategic Change (continued)

3:15-3:30pm  BREAK

3:30-6:00pm  Cultivating Effective Relations with the Board of Directors

*Marty Martin, J.D., MPA, Martin Law Firm, Raleigh, NC.; Formerly served on the IRS Advisory Committee on Tax Exempt and Government Entities (ACT); BoardSource Certified Governance Trainer, marty_martin@martinlegalhelp.com*

Results in the nonprofit sector derive from strong leadership between nonprofit executive(s) and their volunteer board of directors. The overall landscape of nonprofit governance has changed with regulators, stakeholders, donors, and the public demanding increased accountability to ensure that organizations achieve results. Through an interactive dialogue, the class will consider promising practices for forging effective relationships between board and staff given the asymmetries in the knowledge, information, and incentives between the board and nonprofit’s executive(s). Submit in advance and/or bring your questions and issues to frame the conversation.

Key Learning Objectives:
1. A harmonious relationship between the executive director and the board chair is critical
2. Develop a clear understanding of each other’s roles and responsibilities is fundamental
3. Board recruitment must be done with absolute candor
4. Executive directors must avoid becoming an enabler for the board
5. Passion for the mission is not enough

6:00-7:00pm  DINNER

7:00-8:30pm  Introduction to Social Entrepreneurship

*Matthew T.A. Nash, Managing Director, Social Entrepreneurship, Duke Innovation & Entrepreneurship Initiative*
What is social entrepreneurship? Universities, the media, nonprofits, and even the White House seem to be increasingly using this term, but what does it really mean? In this interactive session, nonprofit leaders will explore the core concepts of social entrepreneurship through a case study example of 2006 Nobel Peace Prize Winner and microfinance pioneer Muhammad Yunus and his Grameen Bank. What can we learn from this powerful story of an entrepreneurial leader who identified an opportunity, mobilized resources, and achieved significant social impact? What can we learn from leading edge research in the emerging field of social entrepreneurship if we are seeking to have greater impact? How can participants apply the principles of social entrepreneurship in their lives and work?

**Wednesday, October 14**

8:00-8:15am  **Morning Check-In Session**  
*Love & Nash*

8:15-11:15 am  **Managing Diversity and Sustaining a Culture of Inclusion**  
*Inderdeep Chatrath, Ph.D., Office for Institutional Equity, Duke University & Duke University Health System, nderdeep.chathrath@duke.edu*

As the national and the world landscape changes, the future workplace and communities will inevitably become more diverse. Emerging dimensions of diversity will pose both opportunities and formidable challenges to sustain organizational effectiveness, especially in the non-profit sector. Only through heightened awareness and deliberate efforts will organizations successfully leverage diversity to support an inclusive and high performing organizational culture.

While diversity is a value among corporate leaders and a much sort after institutional imperative among public and private organizations the conceptual framework for fully leveraging diversity and weaving it into the fiber of organizational culture eludes the leadership. This session will emphasize the role of leaders and key stakeholders to consider diversity and inclusion to innovate and solve complex problems.

We will explore strategies to use qualitative and quantitative data to move beyond the typical “moral-driven” framework of “it is the right thing to do” to a robust strategic driven framework based on compelling interest and a business case to build an inclusive and diverse organizational culture.

Based on research and best practices, we will discuss the key levers to strategically weave diversity and inclusion more deliberately into the organizational cultures. These key levers include: Creating an Infrastructure; Leadership Engagement and Accountability; Fostering an Inclusive Climate; and Developing Processes and Systems to monitor progress.
The session will conclude with a discussion of effectively engaging institutional leadership to champion the values of diversity and to promote a business case for an organizational culture that will meet the expectation of both internal and external audiences.

**Key Learning Objectives:**
1. Develop an appreciation for diversity and inclusion as key drivers for institutional excellence.
2. Understand diversity as a key element and fundamental to the mission, vision and values of the organization.
3. Develop strategies to effectively engage the boards, leadership teams, and other decision makers to champion diversity as a core organizational value.
4. Identify your role as a change agent.
5. Develop and implement strategies to fully leverage institutional resources and build alliances with key stakeholders.

11:15-12:30pm  **Preparing for the Next Generation of Leaders**
Moderated by Matthew T.A. Nash, Managing Director, Social Entrepreneurship, Duke Innovation & Entrepreneurship Initiative
Given the impending exodus of nonprofit leaders over the next five years, it is imperative for present leaders to cultivate those who will succeed them. In this session, a panel of emerging leaders will engage the participants in a dialogue on the motivations, ways of working, and aspirations of the rising generation.

**Key Learning Objective:**
- Participants will be better equipped to develop strategies for fostering a diverse cohort of new leaders in their organizations.

12:30-1:45pm  **LUNCH**

1:45 - 4:15pm  **Coaching Your Staff towards Organizational Success**
*Benjamin Quinn, MBA, FarmBlue Ventures, Certified Business Coach*
benquinn@farmblue.com

This session is designed to give nonprofit executives a clear and actionable organizational management framework that attracts, motivates, and retains the top talent, and that empowers the executive to get the greatest results out of their team. During this session, you will learn how to cultivate the “Seven Characteristics of a Highly Effective Team.” We will outline a clear process you can use to successfully coach your staff to accomplish organizational objectives on time, with the resources given, and with exceptional results. As a result, participants will have an increased ability to foster and maintain a team dynamic that helps create results greater than the sum of each individual’s contribution.

**Key Learning Objectives:**
1. Learn how to create a culture that attracts and nurtures the right employees needed to meet a nonprofit’s needs.
2. Understand and support a team dynamic that helps create results greater than the sum of each individual’s contribution.
3. Create an environment where the Executive Director coaches the employee and organization to reach their maximum potential with the resources given.

4:15-5:45pm  Using Social Media to Extend the Voice and Impact of Your Nonprofit

When social media is used effectively, it can help your nonprofit fulfill its mission, increase awareness and engage stakeholders. But as social media evolves, how do you keep up? What are the best practices – and the pitfalls? In this session we will talk about strategy and tactics for tackling social media.

Key Learning Objectives:
1. Understand the importance of social media and strategies for implementing it effectively
2. Identify best practices and discuss challenges of the major social media channels

6:00pm  Dinner/Reception (Washington Duke Inn & Golf Club)

Thursday, October 15

8:00-8:15am  Morning Check-In Session
Love & Nash

8:15-10:00am  Cultivating an Entrepreneurial Nonprofit Culture
Suzanne Smith, Founder & Principal, Social Impact Architects
Suzanne@socialimpactarchitects.com

The complicated challenges facing contemporary nonprofit organizations demand a dynamic brand of leadership. An entrepreneurial outlook can help to transform the culture of nonprofits by meaningfully engaging the abilities, talents, and passions of board, staff and supporters.

Key Learning Objectives:
1. Explore how key entrepreneurial concepts and skills that make for-profit businesses competitive can be applied to nonprofit organizations to help make them more sustainable and successful.
2. Understand the basic elements of an entrepreneurial mindset that will offer a practical framework for entrepreneurial activities.

10:00-10:15am  BREAK

10:15-12:00pm  Social Enterprise: Is Earned Income Right for Your Organization?
Suzanne Smith, Founder & Principal, Social Impact Architects

In the face of increasing competition for limited and volatile philanthropic funding, many nonprofits are turning to earned income ventures as a potential alternative to traditional nonprofit fundraising strategies.
Key Learning Objectives:
1. Understand what social enterprise is and whether or not you are ready to pursue it within your organization.
2. Learn about characteristics of a successful enterprise.
3. Identify and evaluate strengths through an organizational audit and how to translate these strengths into social enterprise opportunities.
4. Engage in a process to evaluate the identified opportunities in an effort to determine which should be studied in more detail through a feasibility assessment.

12:00-1:15pm LUNCH

1:15-2:30pm Social Enterprise: Is Earned Income Right for Your Organization? (continued)

2:30-3:45pm Social Enterprise in Action: Lessons from the Trenches
Panelists
A panel of leaders of entrepreneurial nonprofits will engage the participants in a dialogue on the opportunities and challenges of incorporating principles and practices of social enterprise into nonprofit strategy, operations, and culture.

Key Learning Objectives:
1. Understand some of the practical challenges of incorporating social enterprise into nonprofit operations
2. Identify concrete actions leaders can take to address these challenges and mitigate risks of failure to achieve mission impact and generate significant income.

3:45-4:00pm BREAK

4:00-6:00pm Emerging Issues in the Nonprofit Legal Landscape
Andrew Foster, Clinical Professor of Law; Director of the Community Enterprise Clinic, Duke Law School

Nonprofit leaders must manage the affairs of their nonprofit corporation in an evolving legal landscape. As nonprofit organizations have become more entrepreneurial, they too often have been stymied by legal and regulatory regimes that were designed for an earlier era. In this session, participants will have an opportunity to discuss these and other issues with an expert in nonprofit law.

Key Learning Objectives:
1. Develop an awareness of significant legal doctrines that impede their entrepreneurial plans
2. Understand the likely direction of future law reform in this area.

6:00-7:00pm DINNER

7:00-8:30pm Finding My Voice
Sean Lilly Wilson, CEO and Founder, Fullsteam Brewery, sean@fullsteam.ag
Finding our voice is a vital element of leadership. In order to communicate to the world about our life's work, we need to be able to articulate our purpose and our truth. Telling these truths becomes an entry point to embracing the joy and pain of who we really are and what we bring to our efforts to make a difference in the world. This session will help participants understand the impact of old stories and how to create new stories, which can propel us and our organizations in the directions that matter most.

**Friday, October 16**

8:00-8:15am  **Morning Check-In Session**  
*Love & Nash*

8:15-10:15am  **Ethics In Nonprofit Organizations**  
*Hudson Fuller, J.D., MPH, is a licensed attorney, hudsonfuller@yahoo.com*

Maintaining the public’s trust is crucial to a nonprofit's continued work and yet the misdeeds of a few have eroded the public's trust in all nonprofit organizations. Nonprofits rely heavily on their good reputation to raise money and develop services in the community. As such, nonprofit leaders must be aware of various ethical risks and dilemmas that nonprofits may face. In this session, we will look at why nonprofits are so vulnerable to unethical behavior and strategies for promoting ethical cultures within nonprofits.

**Key Learning Objectives:**
1. Identify areas of risk exposure for unethical behavior in nonprofit organizations.
2. Identify steps nonprofits can take to avoid ethical pitfalls including developing conflicts of interest policies and sound fiscal policies.
3. Understand the components of a deliberative process for analyzing ethical dilemmas.
4. Identify key components of ethical leadership.

10:15-10:30am  **BREAK**

10:30am-12:30pm  **Managing for Results**  
*Matthew T.A. Nash, Managing Director, Social Entrepreneurship, Duke Innovation & Entrepreneurship Initiative*

More than ever, nonprofits are under pressure to measure and report on their impact and to “manage for results” in an era of strained resources. In this session, we will discuss how to identify and refine your organization’s “theory of change” and we will review several practical tools for social impact measurement. We will conclude with a discussion of emerging trends in social impact measurement.

**Key Learning Objectives:**
At the end of the session, participants should be able to:
1. Articulate the “theory of change” for their organization or program.
2. Identify practical measures of outputs and outcomes.
3. Create a culture of performance management within their organization.

12:30-1:30pm  
LUNCH

1:30-3:00pm  
Closing Session  
*Love & Nash*

In this session, we will bring closure to the Duke Executive Certificate in Nonprofit Leadership program by reviewing and discussing the key themes of the week. We will also share the revised leadership development goals that each participant will commit to pursuing in the months ahead.

The Duke Executive Certificate in Nonprofit Leadership will be awarded.

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Note
- Some Agenda items may change.
- Reading Assignments, links, etc. will be sent to students within 30 days of class start date.

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(In collaboration with the Duke Fuqua School of Business)  
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