

# Virtual Summit Agenda

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DAY 1

## COFFEE CHAT: Evaluate Your 2021 Unemployment Costs & Find Savings! hosted by First Nonprofit

The COVID-19 pandemic has resulted in the filing of more than 55 million unemployment claims across the country. As organizations begin to re-open or shift operations to safely accomplish their missions, organizations should use this time to evaluate the impact of these unemployment claims to their 2021 budget and beyond. KNN's partners at First Nonprofit provide many Kentucky nonprofits with state compliant, cost-saving programs for your state unemployment (SUI) requirements. Cecilia Piazza with First Nonprofit will answer your questions and help you evaluate if this program might provide an important savings opportunity for your organization.



## COFFEE CHAT: Community Resilience through Community Connections, hosted by WellCare

A resilient community is socially connected and has accessible community connections to foster self-sufficiency. Community resilience focuses on enhancing the day to day health and wellbeing of communities by promoting physical, behavioral and social health. Join me to learn how you can connect communities to social service resources to increase resiliency through partnerships.



## KEYNOTE & DEEP DIVE: Change the Questions, Change the World, with Hildy Gottlieb

How can we create a future different from our past? Hildy Gottlieb will share what she has learned in 20+ years of research and experimenting, to identify a practical approach to systems change that anyone can do. Rooted in fields as far-ranging as neuroscience and history, mathematics and sociology, Hildy will share how you can change the systems you encounter every day. Change the questions, change the world!

DAY 2

## COFFEE CHAT: Leadership Doesn't Have to Feel Lonely, hosted by MG Coaching & Consulting

How is it that leading an organization can feel so lonely, but to lead we must be in the company of others? If you're feeling weighed down by the responsibilities of your job, overwhelmed by challenges, or alone in your pursuit of excellence - join me. We'll have an opportunity to share successes and challenges, learn from peers and leave feeling like you're not so alone.



## COFFEE CHAT: Why Give? (Not) Just Because. with Jessica Coleman Hastings

Making a case for charitable giving is more important than ever in this fundraising landscape. Potential and even current donors want to know "why?" In the past, our sector may have been able to get by with a simple answer, such as "because you believe in our mission" or "because you are a faithful supporter." Now, people want more. During this coffee chat, we'll explore some questions you could ask yourselves to make a case – or refresh your case – for giving.

## KEYNOTE & DEEP DIVE: Financial Leadership in the Face of Impossible Choices, with Curtis Klotz

Financial leadership during times like these requires an unflinching look at your current fiscal state and a willingness to seek and share solutions across your whole organization. Holding true to your mission will guide you towards thoughtful, compassionate, and effective decisions in the midst of hardship and disruption. Taking a whole organization approach to financial leadership ensures you bring your best thinking and the strength of collaboration to the task. To help, this session offers you a few simple financial tools and some creative approaches to navigate otherwise impossible choices. Join Curtis Klotz, Director of Nonprofit Innovation at CLA, for this timely conversation.

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DAY 3

## COFFEE CHAT: Financial Flexibility and Board Fiduciary Duties in the Wake of 2020, hosted by Manley Burke, LPA

We have seen a variety of legal challenges that our nonprofit clients have faced as a consequence of the events of 2020 and wanted to provide an overview of some of the recurring issues we have seen arise. Specifically, we will quickly touch on topics such as restricted funds and releasing restrictions, creating endowments, prudent investments, and the importance of complying with state and federal filings such as Form 990s, state registration and annual reports. These topics are just jumping off points. We would love to have a robust discussion of the specific issues affecting your organizations.

MANLEY BURKE

a legal professional association

## COFFEE CHAT: The Rewards of a Clear DEI Goal: Crafting Goals That Transform, hosted by Decide Diversity

Diversity, equity, and inclusion is a necessity for nonprofit organizations. To get the most out of your DEI initiatives, start with clear and measurable goals. It might sound easy, but it takes courageous leaders to create goals that transform organizations and communities. Join us for a chat and learn the key to developing clear, transformative goals that set your organization up for success!



## KEYNOTE & DEEP DIVE: Meeting HR Challenges and Opportunities in 2020 and Beyond, with Melanie Herman

Join Melanie Lockwood Herman, Executive Director at the Nonprofit Risk Management Center to explore some of the top HR risks relevant to today's 'new normal' for nonprofit organizations. Learn about common missteps and dangers in HR practices as well as how to make sure that your policies and HR practices suit today's unique landscape. Leave this session with renewed confidence about the changes you need to make in HR to build and support a team that enables your mission to survive and thrive.

DAY 4

## COFFEE CHAT: What to Consider with New Revenue Streams, hosted by Blue & Co.

2020 has brought in a number of challenges and even some opportunities. Among them might be new or different types of revenue for your organization, such as in-kind donations, contributions and earned revenue. You may even have concerns about Unrelated Business Income Taxes (UBIT) this year. Bring your questions to the team from Blue & Co. to discuss how these might impact your financial statements.



## COFFEE CHAT: Advocacy in the Wake of COVID-19, with Bart Baldwin & Sarah Kidder

The inability to meet in person with legislators, government officials, and their staff has changed the dynamics of advocacy and lobbying. Some changes, such as the ability to connect via Zoom and other platforms, have increased access. However, as the Kentucky General Assembly looks to reconvene for a hectic short budget session in January, there are many unknowns and plenty of cause for concern. Bart Baldwin and Sarah Kidder of Bart Baldwin Consulting will host a discussion on how advocacy efforts, particularly in Frankfort, may look different in the upcoming session; and strategies for how nonprofit advocates can successfully communicate on the issues.

## KEYNOTE & DEEP DIVE: From Year-End Fundraising to Year-Round Engagement, with Farra Trompeter

As you are getting ready for a (hopefully!) generous outpouring of support on #GivingTuesday and throughout year-end season, it can be tempting to return to the status quo in the new year. In this session, Farra Trompeter, chief growth officer of Big Duck, will explore ways you can evaluate and improve your donor engagement efforts year-round through smart communications and activities, blending both new and traditional approaches. She'll also review examples from nonprofit organizations and share strategies for getting your donors to feel connected to your mission.

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DAY 5

## COFFEE CHAT: The Benefit of Employee Benefits: Obtaining & Managing Health Insurance for Your Staff, hosted by KNN Employee Benefits Program

Let's face it. Understanding health insurance and employee benefits isn't easy. But it's important. Join us for this discussion about how to provide your employees with the benefits they deserve through your KNN membership and the KNN Employee Benefits Program. If you think you cannot afford it or that your organization is too small, Kelly will explain your options. You may also have concerns about how to manage benefits when you already have a full plate. We will talk about ways you can simplify enrollment, remain compliant with regulations, and boost your staff morale and engagement.



## COFFEE CHAT: Avoiding a Bored Board: Engaging Your Board Virtually, with Danielle Clore

Kentucky law permits meetings and votes to be held virtually, but that doesn't mean engaging your board in this way is easy or ideal. Join KNN's CEO, Danielle Clore for a quick review of what's permitted and a discussion on what's working and what's not with virtual board and committee meetings. Bring your experiences and questions!



## KEYNOTE & DEEP DIVE: Diversity, Equity, and Inclusion through Governance, with Vernetta Walker

Creating high-performing nonprofit organizations requires attracting the right mix of individuals with diverse perspectives, skills, backgrounds, and creating an environment where everyone can fully engage in advancing the mission. While more nonprofits are starting to realize that diversity, equity, and inclusion (DEI), cultivating an inclusive and equitable environment remains elusive to many. This workshop session will identify key action steps for the board and executive to set the tone at the top. We will explore how to start or deepen the conversation within your organization, address the elephants, and leverage diversity and inclusion for mission impact.

DAY 6

## COFFEE CHAT: The Pressures of Crisis Leadership, with Dr. OJ Oleka

Leaders often feel like every decision is critical to the success of our team, organization, or bottom line. As a result, there is tremendous pressure put on us — by others and ourselves — to get every decision right. This can sometimes lead to anxiety, overexertion, and ultimately a wrong decision. During crisis leadership, as we are all experiencing right now, that pressure is heightened. In this discussion, Dr. Oleka will lead an honest conversation on the humanity of leadership and how understanding your imperfections as a human being can help in maximizing your potential as a great leader, especially in a crisis.

## COFFEE CHAT: Managing Remotely: HR Considerations for a Remote Workforce, with Eric Monks

Remote management is here to stay. We live in a work culture where people are constantly engaged with their mobile devices. To recruit, retain, develop, and engage top talent in this modern landscape, organizations need to invest in their capabilities of managing employee HR functions in a remote environment. There are platforms that can help your organization automate daily tasks and make them less complex. Join us to discuss these trends and how they can give your team members the access they need wherever and whenever they need it.

## KEYNOTE & DEEP DIVE: How Change Happens, Forces for Good, and the Importance of Advocacy, with Leslie Crutchfield

In this moment of triple crisis — a time when communities are enduring the COVID-19 pandemic and an economic recession with unemployment rates rivaling the Great Depression while calling for a racial reckoning — nonprofits must lead the way. And whether they provide front line services to vulnerable populations, or advocate for local, state and national policy reforms, nonprofits are critical to helping communities not only survive but thrive during these challenging times. In this session, social change expert and author Leslie Crutchfield will share insights from her research on high-impact nonprofits and social movements, and discuss how the successful strategies can be employed by nonprofit leaders today to achieve positive change on the ground.