

next steps

San Francisco, California

June 22-23, 2008



Presented by CompassPoint Nonprofit Services

Sponsored by the National Legal Aid & Defender Association

Presented by CompassPoint Nonprofit Services, the **next steps** workshop helps long-term and founder executives explore the critical and complex issues around succession planning and transition. This intensive, two-day session provides a safe and confidential place to ask difficult questions and explore a variety of organizational and personal issues with peers and consultants. More than 250 founders and long-term executives from around the country have benefited from the **next steps** workshop.

Next Steps workshops are designed for founders or long-term executives of nonprofit organizations planning to leave their position in the next 1-6 years. They provide:

- Lessons and best practices from 15 years of practice and research in succession planning and leadership transitions.
- An opportunity to hear from and network with executives who are actively involved in leadership succession and/or transition planning.
- Techniques for managing succession and transition in ways that enhance agency capacity... whether departure is 12 months or 6 years away.
- A confidential place to reflect and discuss specific succession and transition concerns with peers and resource consultants.

A Next Steps workshop takes place over two days and includes:

- An overview of succession and transition planning processes.
- Mini working sessions that address tailoring your role through a transition, organizational assessment, succession planning, and building organizational capacity and sustainability.
- Panel presentations including executives who have made successful transitions.
- Small and large group discussions that enable participants to discuss issues related to their particular succession and transition challenges.

Location:

CompassPoint Nonprofit Services

731 Market Street, Suite 200, San Francisco, CA

June 22-23, 2008

(Day 1 – 9:00 a.m. – 5:30 p.m.) (Day 2 — 8:30 a.m. – 4:30 p.m.)

The Next Steps Workshop was originally developed by TransitionGuides with funding support from the Annie E. Casey Foundation.

What participants say about the Next Steps workshop:

“Stepping down from a nonprofit organization that I helped build from the ground up was the hardest thing I ever had to do. Attending the Next Steps Workshop helped me gain perspectives from other founding and long-term directors and gave me ideas of how to continue to help the organization through the executive transition, how to take a step back and let the organization run without my control, and how best to support future efforts.”

Jennifer Felt Korczakowski, Formerly Founding Director, Village Learning Place, Inc., Baltimore MD; now Director of Development for Parents' Choice Foundation

“Nothing lasts forever, not even your labor of love. This Workshop helped me to put this into perspective in an environment with professionals that were nurturing and supportive.”

Robert Jackson, Executive Director, Quitman, County Development Organization, Marks, MS

“I haven't yet decided as to the schedule for my leaving but the Next Steps program has been invaluable for helping me take the early and long term steps to prepare EBALDC for my leaving by strengthening our next level of management.”

Lynette Lee, Executive Director, East Bay Asian Local Development Corporation, Oakland, CA

“Being both a long-term executive (31 years) and a founder, I found the Next Steps Workshop very helpful...For me, “taking care of myself” and focusing on where I was helped me to then focus on the process and challenges. [After the workshop] I was able to help two executives in my local community who were “blocking” on dealing with the dynamics involved.”

Robert McMahon, Founding Executive Director, St. Christopher Otillie, Glen Cove, NY

“The Next Steps workshop was a transformational and life-altering experience for me. As a result of this workshop. I requested & got a 2-1/2 month paid sabbatical. And I reconfirmed that I have many productive years left here. I am much better prepared for my eventual decision to retire”

Esther Newman, Executive Director, Leadership Montgomery, MD

Between two-thirds and three-quarters of executive leaders will leave the nonprofit world in the next five to ten years.

See Daring to Lead (2006) CompassPoint Nonprofit Services and Change Ahead (2004) Annie E. Casey Foundation.

Legal services organizations, public defender offices, nonprofit, government and corporate sectors are all grappling with this anticipated generational leadership shift. These transitions in organizational leadership are the secret that few executives, boards and funders are actively addressing.

Researchers find consistently that lack of succession planning can result in a post-transition meltdown. Legal services and public defender clients cannot afford the consequences of organizational ineffectiveness caused by leadership transitions. NLADA wants to support our leaders' ability to build and sustain a legacy of serving low-income communities and

afford the chance to transition into other opportunities in a second life.

NLADA is partnering with CompassPoint Nonprofit Services to offer an important opportunity for leaders to learn how to both prepare themselves and their programs for their leadership transition.

Come to Next Steps and learn the importance of:

- Planning and engaging in activities that help you leave a sustainable legacy and address personal and professional issues.
- Developing a "leaderful organization" where leadership runs up and down your organizations' structures.
- Creating an emergency succession plan that helps the organization sustain your unplanned departure or short-term or long-term absence.

ABOUT THE WORKSHOP FACILITATORS

TIM WOLFRED, Psy.D

Tim Wolfred, Psy.D., is director of Executive Leadership Services at CompassPoint Nonprofit Services. After having served as interim executive director in 16 Bay Area nonprofits, he developed the CompassPoint's Executive Transitions program in 1998, which has now worked with over 300 nonprofit agencies. Tim has been under contract with the Annie E. Casey Foundation for 5 years to assist local communities across the country in developing their executive transition services. Recent additions to CompassPoint's Executive Leadership Services program include an executive coaching service, leadership training seminars, and a sabbatical awards program. Tim is co-author of three seminal studies of executive director tenure and experience, "Leadership Lost" (1999), "Daring to Lead" (2001) and "Daring to Lead 2006", which are published by CompassPoint and have received extensive attention nationally. Tim authored a monograph "The Power in the Middle: Interim Executive Directors" which was published by the Casey Foundation in 2005.

VIVEKA CHEN

Viveka Chen provides culturally competent organizational and community consulting and facilitation services. She specializes in executive transitions, strategic planning, strategic decision making facilitation, board development and board retreat facilitation, staff retreat facilitation and organizational/operational restructuring.

Since 1990, Viveka has worked with the Bay Area's low-income communities of color using community development and community building as a means of realizing racial, social and environmental justice. Prior to joining CompassPoint's Executive Transition's group in 2001, she worked as executive director of the East Bay Conversion & Reinvestment Commission.

She is chairwoman, board member and a teacher at the San Francisco Buddhist Center and is leading an initiative to help individuals sustain their activism/service work with the support of mediation.

BYRON JOHNSON

Byron Johnson, CFRE, is projects director for CompassPoint Nonprofit Services, one of the country's leading nonprofit consulting organizations, based in the San Francisco Bay Area.

He specializes in executive transitions, fund development, and other areas of organizational capacity building, which include board development, fundraising planning and executive coaching.

Byron also teaches fund development and executive transitions workshops in CompassPoint's training and conference series and serves as co-director and lead trainer of the Fundraising Academy for Communities of Color, an 8-month training and coaching series offered in collaboration with the Grassroots Fundraising Journal. Prior to joining CompassPoint, he worked in senior development positions for San Francisco State University, the East Bay Asian Local Development Corporation, and the YMCA of the East Bay.

JUDE KAYE

Jude Kaye is a senior fellow with CompassPoint Nonprofit Services and a nationally respected author, trainer, facilitator, consultant and executive coach. In her consulting work she specializes in strategic planning and organization development and is the co-author of the book *Strategic Planning for Nonprofit Organizations, A Practical Guide and Workbook* (John Wiley and Sons, second edition: 2005).

Over the past three decades, Jude has worked with hundreds of large and small nonprofit organizations and has served on many nonprofit boards. She teaches consultants how to have a greater impact through CompassPoint's three day Institute for Nonprofit Consulting and provides executive coaching services through her company, Intention to Action. In her coaching work she specializes in helping individuals manage life's changes so as to increase the joy and meaning in their lives. She can be reached at 415-505-4321 or JudeKaye@sbcglobal.net.



Next Steps REGISTRATION FORM

San Francisco, California – June 22 – 23, 2008

For registration paid by check, please complete this form and mail form and payment to: NextSteps Conference, P.O.Box 79083, Baltimore, MD 21279-0083. Registrations paid with credit card (MasterCard or Visa only) may be faxed to (202) 872-1031. The regular registration deadline is June 6th. Please register onsite after this date. Confirmation of your registration will be mailed to you. If you have any questions about registration, please contact Risa Hoffman at risa@nlada.org or (202) 452-0620 x207.

Name: _____ E-Mail: _____

Title: _____

Organization: _____

Address: _____

City, State, Zip: _____

Telephone: (____) _____ Fax: (____) _____

SPECIAL NEEDS: Check all that apply Mobility Disability Audio/Visual Disability Vegetarian Meal Other: _____

REGISTRATION FEES:

	Early Received by April 30th	Regular Received between May 1st –June 6th	Late Received After June 6th
Program Member	<input type="checkbox"/> \$600	<input type="checkbox"/> \$650	<input type="checkbox"/> \$695
Individual Member	<input type="checkbox"/> \$650	<input type="checkbox"/> \$695	<input type="checkbox"/> \$750
Non Member	<input type="checkbox"/> \$750	<input type="checkbox"/> \$795	<input type="checkbox"/> \$850

MEMBERSHIP: Not sure if your program is a member? Contact us at membership@nlada.org. Join NLADA now as an individual member at this special conference rate:

- Individual Attorney \$75
- Individual Non-Attorney \$40

Yes! I want to become a member of NLADA (see above panel for fees) _____

TOTAL PAYMENT _____

PAYMENT: Check enclosed, made payable to NLADA MasterCard Visa

Credit Card # _____/_____/_____/_____ Expiration Date ____/____

Signature _____ Name on Card _____

PURCHASE ORDERS: Purchase orders must include contact information for the appropriate accounting or finance department that will process the payment. Please complete the following:

Name: _____ Title: _____

Phone: _____ E-mail: _____

CANCELLATION POLICY: Registration cancellations must be received in writing no later than June 6, 2008. Cancellations, transfers and refunds are subject to a \$75 administrative charge. After June 6th registrations are transferable but not refundable. Transfer requests must be received within 30 days after the conference to be considered. Transfers must be applied to another NLADA event scheduled prior to December 31, 2009 or be forfeited. Substitutions may be made at any time with written notification to the NLADA Training Department.

REFUND POLICY: Please calculate your total payment carefully. In order to receive a refund of any overpayment relating to registration, you must submit a refund request in writing to NLADA, Next Steps Conference Refund Request, 1140 Connecticut Avenue, NW, Washington DC 20037; 202-872-1031; or training@nlada.org. Refund requests must be received within 30 days after the conference to be considered. No refunds will be processed without a written refund request.

DATES TO REMEMBER

April 30th
Early Conference Registration Ends

May 29th
Housing Deadline

June 6th
Regular Conference Registration Ends
Registration Cancellation Deadline

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Day 2: 8:30 am - 4:30 pm

San Francisco Marriott

55 Fourth Street, San Francisco, CA 94103

415.896.1600 (Phone)

www.marriott.com/sfodt

NLADA has arranged for sleeping rooms at the nearby San Francisco Marriott. Conference attendees staying at the San Francisco Marriott will receive a special housing rate of \$152.00 single/double per night exclusive of sales tax. The deadline date for reservations is May 29, 2008. After that date, requests for reservations will be accepted on a space and rate availability basis. All reservations must be guaranteed by credit card or deposit. Be sure to inform the reservations agent that you are with the NLADA conference to secure the discounted rate. Check-in starts at 4:00 pm and checkout is at Noon.

TRANSPORTATION:

Special airfare discounts of up to 10 percent is available to San Francisco/Oakland on United Airlines. Phone United at (800) 521-4041 and provide meeting identification code 556AI. Fares are subject to airline terms and availability. NLADA has added travel partner, American Airlines for a 5 percent discount off airfares to San Francisco/Oakland. Book fares online only at www.aa.com. To get the NLADA discount, indicate A8468BC in the promotional code

San Francisco International Airport (SFO) is located 18 miles from the San Francisco Marriott Hotel. A taxi from SFO to the hotel costs \$45 one way. Super Shuttle service is \$16 one way per person and the San Francisco subway system (BART) is \$4.70 one way per person.

Oakland International Airport (OAK) is located 19 miles from the San Francisco Marriott Hotel. A taxi from OAK to the hotel is approximately \$65 one way. Super Shuttle service is \$18 one way per person, and the San Francisco subway system (BART) is \$2.85 one way per person.

CAR RENTAL:

Avis, the official rental car agency for this conference, will extend participants a 5 percent discount on a lower promotional rate. These special rates include unlimited mileage. To make reservations, call Avis toll-free at (800) 331-1600 and refer to reservation code # J789524.

CANCELLATION POLICY:

Registration cancellations must be received in writing at the NLADA office no later than June 6, 2008. Cancellations and refunds are subject to a \$75 administrative charge. After the deadline, registrations are transferable, less a \$75 administrative charge, to another NLADA training event scheduled before December 31, 2009, but are not refundable. Transfer requests must be received within 30 days after the conference to be considered. Substitutions may be made at any time prior to the event. Please notify NLADA of substitutions in writing.

CLE:

NLADA has applied for continuing legal education (CLE) credits in most states that have mandatory CLE requirements. CLE forms, instruction and a list of accrediting states will be included in the onsite registration packets.

SPONSORSHIP, EXHIBITING & ADVERTISING:

There are many opportunities for individuals, programs, organizations and corporations to get involved with the conference. If you are interested in exhibiting, placing an advertisement in the conference program book or becoming a sponsor of the conference or special conference event, please contact Deborah Dubois at d.dubois@nlada.org.

REFUND POLICY:

Please calculate your total payment carefully. In order to receive refund of any overpayment relating to registration, you must submit refund request in writing to NLADA, Next Steps Refund Request, 1140 Connecticut Avenue, NW, Washington DC 20037; (202) 872-1031; or training@nlada.org. Refund requests must be received within 30 days after the conference to be considered. No refunds will be processed without a written refund request.

RESPONSIBILITY:

The National Legal Aid & Defender Association acts only as an agent for attendees in all matters regarding hotel accommodations and transportation. NLADA contracts with reputable independent contractors and suppliers known to provide the service offered in this announcement. NLADA is not responsible for any inconvenience, loss, injury or damage from any cause whatsoever in conjunction with these services. If necessary, NLADA reserves the right to cancel or change the services described herein.

Only 21 slots are available, on a first come, first served basis.

Space is limited. Reserve your spot today.

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The National Legal Aid & Defender Association (NLADA), founded in 1911, is the oldest and largest national, nonprofit membership organization devoting all of its resources to advocating equal access to justice for all Americans. NLADA champions effective legal assistance for people who cannot afford counsel, serves as a collective voice for both civil legal services and public defense services throughout the nation and provides a wide range of services and benefits to its individual and organizational members.

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