

**THE ANNIE E. CASEY FOUNDATION/  
CASEY FAMILY SERVICES**

**2010 PROFESSIONAL DEVELOPMENT  
AND LEARNING SERIES**



## DEAR COLLEAGUE:

“Capacity building” has become a popular buzzword in the nonprofit sector, often holding different meanings for different people. Yet, regardless of an individual’s definition, the common denominator is a focus on education. Education continues to be a vital force in ensuring an organization’s ability to assemble the resources, knowledge, and experience needed to deliver quality programs and services that improve the lives of the people they serve.

The Annie E. Casey Foundation/Casey Family Services 2010 Professional Development and Learning Series marks the first time the Foundation formally has offered a menu of training workshops and seminars available to grantees and area nonprofits throughout the year. These training opportunities have been designed with the educational needs of our grantees in mind, and we carefully review workshop and seminar evaluations to assess participant satisfaction with our trainers and the learning that participants consider essential to enhancing their effectiveness within their agencies and the broader community. We also stay abreast of nonprofit trends to deliver workshops and speakers that address timely issues.



# WELCOME

At a time when professional training opportunities are becoming scarce as resources decline, in 2009, the Foundation was pleased to draw more than 450 attendees to its training workshops. Many expressed appreciation for these opportunities, and we sincerely thank you for your interest.

This year, the Foundation will add a new offering: Lunch and Learn Seminars. These quarterly small-group discussions for executive directors and lead program staff are intended to inform and stimulate thinking about topics that impact organizations and their work. To encourage discussion among participants, attendance will be limited to 12 to 15 people. Topics are listed on page 17, and advance reservations are strongly encouraged.

I look forward to hearing from community members about these learning opportunities, as well as additional resources the Foundation might offer. Please contact me at 203.401.6899 or send email to [jjpadilla@aecf.org](mailto:jjpadilla@aecf.org) with your questions and comments.

**JOHN E. PADILLA**

Senior Associate

The Annie E. Casey Foundation

## FEBRUARY

**16** Introduction to  
Results-based Accountability  
9 a.m. to 2:30 p.m.

**23** Introduction to  
Social Media  
1 p.m. to 4 p.m.

## MARCH

**9** Writing a Winning  
Grant Proposal  
10 a.m. to 4 p.m.

**10** Building Supervisory  
Relationships  
9:30 a.m. to 4 p.m.

**23** Lunch and Learn –  
Using Evidence-based Practice in Your Work  
noon to 1:30 p.m.

## APRIL

**15** Results-based  
Accountability 201  
8:30 a.m. to 3:30 p.m.

**27** Recession-proof Fundraising  
10 a.m. to 4 p.m.

## MAY

**10** New Employee  
Hiring Workshop  
10 a.m. to 4 p.m.

**13** Introduction to  
DataHaven  
1 p.m. to 4 p.m.

## JUNE

**10** Strategic  
Communications  
1 p.m. to 4 p.m.

**21** Results-based  
Accountability 101  
8:30 a.m. to 3:30 p.m.

**30** Lunch and Learn –  
The “State” of Connecticut: What’s Next?  
noon to 1:30 p.m.

## JULY

**29** Understanding and Competing  
for Federal Grants  
10 a.m. to 4 p.m.

## SEPTEMBER

**17** Understanding Behavioral Economics  
1 p.m. to 4 p.m.

**21** Lunch and Learn – Health Care Reform:  
What Does It Mean for Connecticut Nonprofits?  
noon to 1:30 p.m.

## OCTOBER

**15** Results-based Accountability 101  
8:30 a.m. to 3:30 p.m.

**28** Customer Service that Advances Your Mission  
10 a.m. to 12:30 p.m.

## NOVEMBER

### 3 Marketing and Public Relations on a Shoestring

1 p.m. to 4 p.m.

### 12 Lunch and Learn – Chasing the American Dream: Credit and Credit Scoring

noon to 1:30 p.m.

## DECEMBER

### 9 Building a Financial Education Program for Your Community

1 p.m. to 4 p.m.



# FEBRUARY

**16<sup>th</sup>** 9 a.m to 2:30 p.m.

## **Introduction to Results-based Accountability**

Nonprofit professionals working on family economic success will learn the basics of Results-based Accountability (RBA), with a particular focus on understanding how it applies to upcoming funding opportunities offered by United Way of Greater New Haven (UWGNH ) and the Casey Foundation. Organizations that have submitted a letter of intent for Casey's New Haven Direct Services Grants or that plan to apply for UWGNH funding under its income priority area are strongly encouraged to attend. The session will cover how to use RBA to complete these grant applications.

Presenters: Phyllis Rozansky, Principal  
Pathways to Results, LLC  
Results-based Accountability Coaches

**23<sup>rd</sup>** 1 p.m. to 4 p.m.

## **Introduction to Social Media**

This half-day workshop offers nonprofit decision makers a practical introduction to new media, designed to assist decision makers and planners in charting a strategic path for using new media within their organizations. Participants will explore several new media and Web 2.0 concepts, including tagging, social networking, dynamic vs. static Web sites, cooperative document editing, blogging, RSS, openness, and the impact of Web 2.0 on organizational culture. Discussion will incorporate lessons learned from United Way's ongoing effort to embrace a Web 2.0 culture and new media tools.

Presenter: J. R. Logan, Director of New Media Strategies  
United Way of Greater New Haven

**9<sup>th</sup>** 10 a.m to 4 p.m.

## Writing a Winning Grant Proposal

Develop an understanding of the role of grants within fundraising and development, and learn to write a case statement that supports your work in this hands-on workshop. Participants will complete an exercise related to the case for support prior to the session to help them understand the nature of the written 'ask,' and how the techniques apply to grant proposals. Following the session, participants will use the case for support they developed to begin formulating a logic model for a program or project, bringing the learning full circle.

Presenter: Diane Gideon-Martin, President  
The Write Source

**10<sup>th</sup>** 9:30 a.m. to 4 p.m.

## Building Supervisory Relationships

Learn the importance of building a partnership with your employees and develop concrete supervisory skills to move your career forward. This session offers supervisors practical steps to help establish or enhance the supervisor-employee relationship by clearly defining communications styles, articulating performance expectations, and establishing working agreements.

Presenter: Janet Waterston, Principal  
Janet Waterston Consulting

**23<sup>rd</sup>** noon to 1:30 p.m.

## Lunch and Learn – Using Evidence-based Practice in Your Work

Presenter: Abel Ortiz, Director of Evidence-based Practice  
The Annie E. Casey Foundation

**15<sup>th</sup>** 8:30 a.m. to 3:30 p.m.

## **Results-based Accountability 201: Creating Performance Measures That Make a Difference**

Workshop participants will learn to develop, apply, and track performance measures to target the outcomes they want to achieve in specific programs and within their agencies. Designed for agency executives, program managers, and professionals responsible for transforming agency cultures to focus on Results-based Accountability, this workshop will outline the seven steps of performance accountability and help you identify critical measures and actions you can take to improve performance within your own work.

Presenter: Phyllis Rozansky, Principal  
Pathways to Results, LLC

**27<sup>th</sup>** 10 a.m to 4 p.m.

## **Recession-proof Fundraising**

Learn about the fund development planning process and participate in an in-depth exploration of major gifts, including effective donor cultivation and solicitation, the role of the board of directors, and organizational accountability and transparency. This session emphasizes that, whether you ask for \$1,000 or more than \$1 million, the principles of the 'ask' are the same. Workshop exercises include writing a case for support and role-playing to help participants formulate a strategy for soliciting major gifts.

Presenter: Abbie von Schlegell, Principal  
Von Schlegell & Co.

**10<sup>th</sup>** 10 a.m to 4 p.m.

### **New Employee Hiring Workshop**

Develop and implement a thoughtful hiring strategy that covers all the bases – from developing the right candidate pool, to screening and interviewing, candidate selection, and managing the hiring transition. Discover tips for attracting the right candidates by clearly defining your needs through a well-written job description and search process.

Presenter: Jengie Pineda Wong, Director  
Celeste Narganes, Senior Associate  
The Bridgespan Group

**13<sup>th</sup>** 1 p.m to 4 p.m.

### **Introduction to DataHaven**

Access to information and an ability to use it effectively is an essential element of community building. Sharing data promotes civic engagement and effective decision-making because it puts information into the hands of community residents and enables them to become more effective advocates for the issues most important to them. This training will familiarize participants with the DataHaven Web site, a public interactive information resource available to all organizations and citizens interested in understanding the Greater New Haven and Valley Region.

Presenter: Mark Abraham, Executive Director  
DataHaven

**10<sup>th</sup>** 1 p.m to 4 p.m.

## **Strategic Communications**

Information is abundant in every organization, and how information is communicated is a vital component of your organizational strategy. Whether you are trying to inform your audience or persuade them to take action, knowing how to communicate your messages effectively is essential to helping managers, colleagues, and customers understand and advance your mission. In this workshop, you will acquire tips for writing clearly and persuasively, apply what you've learned by analyzing and editing writing samples, and find out about resources the best writers keep close at hand.

Presenter: Lee Mullane, Director of Family Services and Systems Communications  
The Annie E. Casey Foundation

**21<sup>st</sup>** 8:30 a.m. to 3:30 p.m.

## **Result-based Accountability 101: Making a Difference for your Customers and in Communities**

Learn to apply the seven steps of Results-based Accountability to identify measurable outcomes, and use data to measure progress and inform decisions on what strategies work for children, families, and adults in the communities you serve and within your agency. Participants will leave the session with an action plan they can use within their teams and with community partners to improve collaboration and performance.

Presenters: Phyllis Rozansky, Principal  
Pathways to Results, LLC  
Results-based Accountability Coaches

30<sup>th</sup> noon to 1:30 p.m.

## Lunch and Learn – The “State” of Connecticut: What’s Next?

Presenters: Panel of state legislators



**29<sup>th</sup>** 10 a.m to 4 p.m.

## Understanding and Competing for Federal Grants

More than \$300 billion in federal grants are awarded each year. If you plan to seek federal funds, be aware that the applications are nothing like those from corporations or foundations. This session will help ease the complexity and confusion of federal grants. Participants should have three to five years of experience preparing corporate and foundation proposals. This workshop will assist you with the following:

- Learn if your organization is in a position to approach federal funding
- Identify government funding sources that match your project or program priorities
- Find available federal grants through online resources and publications
- Prepare a federal grant application/proposal package
- Understand the process of applying or preparing a 50-page federal grant proposal in less than three weeks
- Discuss how peer reviewers will view your proposal

Presenter: Diane Gideon-Martin, President  
The Write Source



**17<sup>th</sup>** 1 p.m to 4 p.m.

## **Understanding Behavioral Economics: Branding, Choices, and Preferences**

Service providers are beginning to understand that they need to know what motivates their clients to build meaningful long-term relationships that will increase positive program outcomes. This session will explore the basic concepts of behavioral economics, the study of psychology's effect on economic decision making. Session participants will learn basic concepts about how people's emotions and thoughts affect financial decisions, identify how those concepts are applied in daily interactions, and use that learning to explore how to develop program materials that attract clients.

Presenter: John E. Padilla, Senior Associate  
The Annie E. Casey Foundation

**21<sup>st</sup>** noon to 1:30 p.m.

## **Lunch and Learn – Health Care Reform: What Does it Mean for Connecticut Nonprofits?**

Presenter: Frances Padilla, Acting President  
Universal Healthcare Foundation of Connecticut

# OCTOBER

**15<sup>th</sup>** 8:30 a.m. to 3:30 p.m.

## **Result-based Accountability 101: How to Produce Measurable Improvements for Customers and Communities**

Learn how to establish indicators and evaluate results related to the well-being of children, families, adults, and communities, and how to use those results to drive decision making and budgeting. Designed for professionals involved in community partnerships, this workshop will encourage participants to work together to apply the concepts of RBA and understand what it takes to “turn the curve” on a key indicator.

Presenter: Phyllis Rozansky, Principal  
Pathways to Results, LLC

**28<sup>nd</sup>** 10 a.m. to 12:30 p.m.

## **Customer Service that Advances Your Mission**

This workshop will help develop strategies to improve the experience of the customers served by your organization. The workshop will look at challenges faced by staff that interact directly with customers, explore the do’s and don’ts of customer service, the needs of customers being served, and telephone and email tips. Participants will be required to bring a copy of their organization’s mission statement to the workshop.

Presenter: Roslyn Williams, Administrative Manager  
The Annie E. Casey Foundation

**3<sup>rd</sup>** 1 p.m to 4 p.m.

## **Marketing and Public Relations on a Shoestring**

During challenging financial times, marketing often seems to be first on the chopping block, while programs and services are considered a necessity. On the surface, this makes sense. However, marketing and public relations are vital to every facet of your organization and, if done right, can increase your organization's capacity to further its mission. This workshop will explore the relationship between marketing communications and organizational capacity, including fundraising; the most common marketing and public relations mistakes nonprofit organizations make; strategies for improving your organization's message and brand; and steps you can take today – at no cost – to advance your nonprofit's mission.

Presenter: Hannah Brazee Gregory, Chief Executive Officer and Founder  
Shoestring Creative Group

**12<sup>th</sup>** noon to 1:30 p.m.

## **Lunch and Learn – Chasing the American Dream: Credit and Credit Scoring**

Presenter: Irene Skricki, Senior Associate  
The Annie E. Casey Foundation

# DECEMBER

9<sup>th</sup> 1 p.m. to 4 p.m.

## **Building a Financial Education Program for Your Community**

Intended for practitioners interested in launching or strengthening financial education programs, this half-day workshop will cover the essential components of financial education programs, including assessing your organizational capacity; reviewing emerging research, literature, and effective practices; examining program design, quality, and implementation; selecting a curriculum; marketing the program; and evaluating program results using key indicators.

Presenter: John E. Padilla, Senior Associate  
The Annie E. Casey Foundation



# LUNCH AND LEARN

The Lunch and Learn discussions are informal opportunities to discover and discuss topics impacting the nonprofit sector. These are not training workshops. Rather, the format for the Lunch and Learn sessions will be a roundtable discussion with approximately 12 to 15 participants. A facilitator will start the session then engage the participants in a deep conversation. Topics for the series include:

## **Using Evidence-based Practice in Your Work** March 23, 2010

The Annie E. Casey Foundation is designing a new area of work that seeks to improve services provided to children and families through the use of evidence-based practice. Come learn what is meant by “evidence-based practice” and how evidence-based practice can be implemented and sustained in the current economic environment.

## **The “State” of Connecticut: What’s Next?** June 30, 2010

At the conclusion of the 2010 Legislative Session, this panel discussion with legislative leaders offers a unique opportunity to learn their thoughts about the state of Connecticut’s fiscal condition, how it can rebound from economic recession, the election of a new governor, and what it all means for us as taxpayers and service providers.

## **Health Care Reform: What Does It Mean for Connecticut Nonprofits?** September 21, 2010

For the first time in two decades, there has been a serious attempt by the U.S. Congress to achieve significant health care reform. Through enactment of the SustiNet Health Partnership Act in 2009, Connecticut’s legislature put the state on a path to covering everyone, controlling health care spending, and improving health outcomes. Come learn about state and national health care reform, what it means for your nonprofit, and how you can get involved.

## **Chasing the American Dream: Credit and Credit Scoring** November 12, 2010

Credit scores have crept into different facets of our daily lives including employment, renting a home, and reference checking. A good credit rating will save the average borrower \$250,000 in interest over a lifetime, but some 70 million Americans either have poor credit scores or no credit history at all. This roundtable discussion includes tips for building a good score, avoiding money traps that can harm credit ratings, and how credit scores are determined.

## PRESENTER BIOS

**Mark Abraham**, is responsible for the development and management of DataHaven, and for delivery of its multiple products and services in support of community-based planning, research, and action. Abraham is a graduate of Yale University and has held positions as a planner with the New York City 2012 Olympic Bid Committee, as director of marketing for the New Haven architecture firm Svigals and Partners, and as an associate at the New Haven consulting firm Holt, Wexler & Farnam, LLP.

**Diane Gideon-Martin**, president of the Write Source, is a grants consultant with more than 200 clients in 23 states. Her dedication to the field is evident in the enthusiastic way she explains the grant seeking process. The materials she has developed for workshops, conferences, and online seminars blend the best of a strong academic program with a practical approach to grant seeking and provide an exceptional learning opportunity for participants. Gideon-Martin currently is on faculty with the Center for Philanthropy at Indiana University, and also teaches for the Connecticut Association of Nonprofits and the Association of Fundraising Professionals (AFP) International.

**Hannah Brazee Gregory** is the founder of the Shoestring Creative Group and has dedicated her career to developing best practices in marketing communications for nonprofit organizations and government agencies. Under her leadership, Shoestring Creative Group has provided marketing, branding, and public relations services to dozens of nonprofit organizations across the country. Gregory maintains hands-on involvement with Shoestring clients and projects, and is particularly well-known for her nonprofit branding expertise and creative energy.

**J.R. Logan** is the director for the New Media Partnership at the United Way of Greater New Haven and United Way of Coastal Fairfield County. In his role, he works to foster an organizational culture of knowledge and learning that empowers employees to effectively participate in online and new media outreach activities. Logan has advised several nonprofits interested in new media and has presented best practices for nonprofits in various forums.

**Lee Mullane** is the director of family services and systems communications for the Annie E. Casey Foundation. She works to build public will for the organization's initiatives regionally and nationally, and through its collaborations with others. With more than 30 years of experience in public affairs and communications, she is the former director of public affairs and communications for Save the Children and has extensive experience in the field of international development and child welfare. She holds a master's degree in public policy from Trinity College in Hartford, Connecticut.

**Abel Ortiz** is the director of evidence-based practice at the Annie E. Casey Foundation, where he scours the field's best learning to help shape and articulate a point of view about what changes are necessary to improve the lives of disadvantaged families and their children. He brings a strong professional background in health policy and practice, having served as policy advisor to Governor Perdue of Georgia, the Governor's liaison to the congressional delegation, and director of compliance and general counsel to the Board of Directors at Davis Behavioral Health in Farmington, Utah.

**Frances G. Padilla**, whose career in philanthropy and organizational development spans 25 years, is the acting president for the Universal Healthcare Foundation, where she is responsible for grant making, public policy research, and administration of day-to-day operations. Prior to joining the Foundation, Padilla was president of New Paradigms, a national consulting practice based in New Haven, where she provided program design, evaluation, and organizational development services to nonprofit organizations, foundations, and government agencies.

**John E. Padilla** is a senior associate for the Annie E. Casey Foundation within the Center for Successful Working Families, where he leads the Foundation's Connecticut work focusing on issues of income security and economic opportunity for low-income families. Padilla was formerly a principal of New Paradigms Consulting, a New Haven-based consulting firm with a national practice providing consulting services to nonprofits, foundations, and government agencies. Padilla has consulted on national workforce initiatives, and worked with several cities to help implement family economic success strategies.

## PRESENTER BIOS (cont'd)

**Phyllis Rozansky** is a principal at Pathways to Results, LLC, bringing more than 15 years of experience in coaching community, nonprofit and philanthropic organizations, and government agencies in the use of Results-based Accountability (RBA) practices. In her role as a senior consultant at the Annie E. Casey Foundation, Rozansky coordinates capacity-building work within the Foundation and with its grantees and RBA coaches. She also develops RBA tools and resources for use throughout the Foundation.

**Irene Skricki**, a senior associate, leads the Annie E. Casey Foundation's work on issues of income security for the working poor. Skricki's role has transitioned into the lead on the Foundation's asset development agenda, including IDAs (Individual Development Accounts), the EITC (Earned Income Tax Credit), and helping to build a field of practice for linking economic opportunity strategies such as EITC outreach, free tax preparation, and financial services. Skricki earned a bachelor's degree from the Massachusetts Institute of Technology and a master's degree in public affairs from the Woodrow Wilson School of Public and International Affairs at Princeton University.

**Abbie von Schlegell** is a respected instructor and lecturer in the areas of major gifts and capital campaigns. Von Schlegell has been in the development field for 35 years, as a consultant with several national firms for half of her career, and as a senior development officer with four institutions. She has expertise in women's philanthropy. Von Schlegell held key development positions at Stanford University and the University of Chicago. She also was the chief development officer for both the Shakespeare Theatre Company in Washington, D.C., and Enterprise Community Partners in Columbia, Maryland. She was the 1990 recipient of the President's Award from the Association of Fundraising Professionals in recognition of her service to the profession.

**Janet Waterston** is a human resources and organizational consultant with over 20 years of experience in both the nonprofit and for-profit sectors. Her consulting expertise includes supervisory, leadership, and management development; employee relations; employment law; executive and management coaching; and

executive transition management. Prior to becoming a consultant, Waterston was the managing director of employee and volunteer resources at GMHC, the oldest and largest non-governmental agency addressing HIV and AIDS, and held senior and corporate human resources positions in the publishing and financial printing industries.

**Roslyn Williams** had over 10 years experience in the hospitality industry with Hyatt Hotels, where she held several management positions in human resources, trained employees in customer relations, and developed a guest report card to monitor guest satisfaction. Now with the Annie E. Casey Foundation, Williams holds a bachelor's degree in social work from Georgia State University and a master's degree in human resource management from Troy State (Alabama).

**Jengie Pineda Wong** joined the Bridgespan Group in 2006 with more than 10 years of nonprofit executive search experience. While at Bridgespan, she has successfully conducted a range of senior-level engagements in education, youth development, human service, health and international organizations, and foundations. Working at top recruitment firms Heidrick & Struggles and Isaacson, Miller, she primarily focused on C-level searches within higher education institutions, human services, environment and cultural arts organizations, and foundations.

## ENROLLMENT

Enrollment for the workshops opens approximately 30 days before the scheduled date. If you are interested in attending a workshop, contact Roslyn Williams at 203.401.6964 or [rswilliams@aecf.org](mailto:rswilliams@aecf.org) at that time to indicate your interest. You are not confirmed to attend a workshop until you receive a confirmation notice from the Foundation. If for some reason you are unable to attend after you have received confirmation, please inform us in a timely manner as there are often people on the waiting list we would like to accommodate. If you come to a session without having registered, you will not be allowed to participate.

## THE ANNIE E. CASEY FOUNDATION

The Annie E. Casey Foundation is a private charitable organization dedicated to helping build better futures for disadvantaged children in the United States. The primary mission of the Foundation is to foster public policies, human-service reforms, and community supports that more effectively meet the needs of today's vulnerable children and families. In pursuit of this goal, the Foundation makes grants that help states, cities, and neighborhoods fashion more innovative, cost-effective responses to these needs.



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For more information about the Annie E. Casey Foundation, please visit [www.aecf.org](http://www.aecf.org).

## CASEY FAMILY SERVICES

Established by UPS founder Jim Casey in 1976 as a source for high-quality foster care, Casey Family Services today offers a broad range of permanency-focused services for vulnerable children and families throughout New England and in Baltimore, Maryland. The direct service agency of the Annie E. Casey Foundation, Casey Family Services is committed to ensuring that every child in care has a lifelong connection to a family or caring adult.



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For more information about Casey Family Services, please visit [www.caseyfamilyservices.org](http://www.caseyfamilyservices.org).