

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

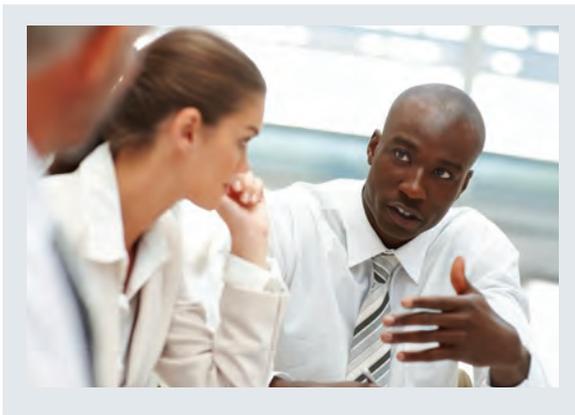
**2011 PROFESSIONAL DEVELOPMENT  
AND LEARNING SERIES**



## DEAR COLLEAGUE:

We live and work in a changing world. New ideas and approaches emerge. New problems arise and new solutions are sought. If we are not adapting as we go about our day-to-day business, then each day will place us further out of touch with the demands of the modern working world. The Annie E. Casey Foundation's Professional Development and Learning Series is structured to help you and your organization get ahead by providing access to new skills and education that can expand your learning.

In 2011, the Learning Series continues to build on the Foundation's approach to results accountability by offering training on how to introduce evidence-based practices into your agency programs. We believe a focus on implementing and adhering to evidence-based practice is a strong complement to our results framework, and will accelerate strengthening of local programs and services. We are seeing our emphasis on teaching results accountability starting to pay dividends as more New Haven nonprofits are moving to implement Results-based Accountability (RBA), and reporting improved understanding of program data and performance. Helping our grantees take a critical look at their work – by pursuing answers to the questions of how much, how well, and who's better off – is leading them to establish program performance measures that shed



# WELCOME

light on these answers. And our results approach has attracted funder colleagues at the Graustein Memorial Fund, the United Way of Greater New Haven, and the Universal Healthcare Foundation of Connecticut to incorporate RBA into their grant making.

There continues to be strong demand for our training workshops – in 2010, our sessions attracted more than 500 attendees, an 11 percent increase from 2009. And we are gratified that attendees continue to give us positive feedback about both the quality of the training and the trainers. In addition to the training on evidence-based practice, other new topics include an intermediate session on writing federal grants, effective practices in case management, public policy advocacy, and a session on how to work effectively in teams. As you look through this catalog, we hope you see training opportunities that fit you and your organization.

In addition to our workshop series, we will continue the quarterly *Lunch and Learn* sessions. Our sessions this year will focus on the importance of attracting and nurturing talent in the nonprofit sector; a briefing on the modernization initiative underway at the Connecticut Department of Social Services; a recap of the 2011 Legislative session and budget decisions; and exploring alternatives to youth incarceration. The *Lunch and Learn* sessions are highly interactive and we encourage you to come ready to engage with our knowledgeable presenters.

We look forward to seeing you throughout the year and welcome your feedback about these learning opportunities, as well as additional resources the Foundation might offer. Please contact us to learn more.

**JOHN E. PADILLA**

*Associate Director*

*Workforce Development and Connecticut Programs*

**YOLANDA CALDERA-DURANT**

*Program Associate*

**ROSLYN WILLIAMS**

*Office Administrator*

## FEBRUARY

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

1 p.m. to 4 p.m.

**3** Introduction to DataHaven

10 a.m. to 3 p.m.

## MARCH

**1** Lunch and Learn: Talent Management and Leadership Development in the Social Sector

noon to 1:30 p.m.

**15** Making a Difference through Performance Accountability

9 a.m. to 3:30 p.m.

**28** Teams in the Nonprofit Workplace: Being an Effective Team Player

10 a.m. to 4 p.m.

## APRIL

**7** Budgeting for Nonprofits

1 p.m. to 4 p.m.

**12** Understanding and Competing for Federal Grants

10 a.m. to 4 p.m.

**15** Results-based Accountability: Making Measurable Differences in Programs and Communities

9 a.m. to 3:30 p.m.

## MAY

**10** Conflict Resolution  
9:30 a.m. to 4 p.m.

**19** Understanding Evidence-based Programs and How They Lead to Positive Outcomes (Part One)  
9 a.m. to 4 p.m.

**20** Understanding Evidence-based Programs and How They Lead to Positive Outcomes (Part Two)  
9 a.m. to noon

## JUNE

**6** Effective Case Management Practices  
1 p.m. to 4 p.m.

**7** Lunch and Learn: Connecticut Department of Social Services and Modernizing Social Service Delivery  
noon to 1:30 p.m.

## JULY

**12** Introduction to DataHaven  
10 a.m. to 3 p.m.

**14** Building Supervisory Relationships  
10 a.m. to 4 p.m.

## SEPTEMBER

**TBA** Lunch and Learn: The Aftermath of the  
2011 Connecticut Legislative Session  
noon to 1:30 p.m.

## OCTOBER

**5** Achieving Better Results for Children, Youth, and Families  
through Collaborative Partnerships  
9 a.m. to 3:30 p.m.

**11** An Introduction to Federal Grants  
(Part One)  
10 a.m. to 4 p.m.

**18** An Introduction to Federal Grants  
(Part Two)  
10 a.m. to 4 p.m.

## NOVEMBER

**2** Becoming an  
Effective Advocate

10 a.m. to 4 p.m.

**8** Introduction to  
Social Media

1 p.m. to 4 p.m.

**10** Lunch and Learn: Introduction to the Annie E. Casey  
Foundation's Juvenile Detention Alternatives Initiative

noon to 1:30 p.m.



# FEBRUARY

**2<sup>nd</sup>** 1 p.m. to 4 p.m.

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

This workshop will cover the essential components of financial education programs, including how to assess organizational capacity to provide these programs; a review of emerging research, literature, and effective practices; an examination of program design, quality and implementation strategies; selection of a curriculum; program marketing; and evaluation using key indicators.

Presenter: John E. Padilla, Associate Director  
Workforce Development and Connecticut Programs  
*The Annie E. Casey Foundation*

**3<sup>rd</sup>** 10 a.m. to 3 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 website, an interactive resource available to all organizations and citizens interested in understanding the Greater New Haven and Valley Region through data.

Presenter: Mark Abraham, Executive Director  
*DataHaven*

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

## **Lunch and Learn: Talent Management and Leadership Development in the Social Sector**

The diversity of work undertaken by nonprofits, foundations, and faith-based organizations share a commitment to improve the lives of others. To do so, nonprofits must attract and engage the best available talent to transform lives. This session will discuss the essential role of leadership development within the social sector and its impact on the future of organizations. *Presented by Rafael Lopez, associate director of Talent Management and Leadership Development, at the Annie E. Casey Foundation.*

**15<sup>th</sup>** 9 a.m. to 3:30 p.m.

## **Making a Difference through Performance Accountability**

This advanced course is designed for teams of three or more people from the same organization who currently are using Performance Accountability, which draws upon best practices in Results-based Accountability. Participants will expand their skills in applying the model's seven steps, particularly in using data to inform decision making and connect program performance to impact. Teams will leave the session with action steps to increase their use of Performance Accountability. Participants who register for this session must have already attended the introductory Results-based Accountability session: "Making Measurable Differences in Programs and Communities."

Presenter: Phyllis Rozansky, Principal  
*Pathways to Results, LLC*

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

## **Teams in the Nonprofit Workplace: Being an Effective Team Player**

Nonprofits that survive and succeed in the current challenging business environment are not defined by assets, but by the capacity of their employees to be flexible, efficient, quick thinking, and responsive. Using simulations, this interactive session will provide participants with ideas and techniques to increase their expertise in team development.

Presenter: Kenya Rutland, Principal  
*KJR Consulting*

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

## **Budgeting for Nonprofits**

Budgets are central management tools in any organization, as well as a critical component in grant proposals. This workshop will cover how to create a budget for new programs and projects; incorporate indirect costs into program budgets; plan for uncertain times; prepare budgets for grant proposals; and monitor and report on progress toward financial goals.

Presenter: Barbara Miller, Principal

*Management Solutions for Nonprofit Organizations*

**12<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 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
- 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 Gedeon-Martin, President

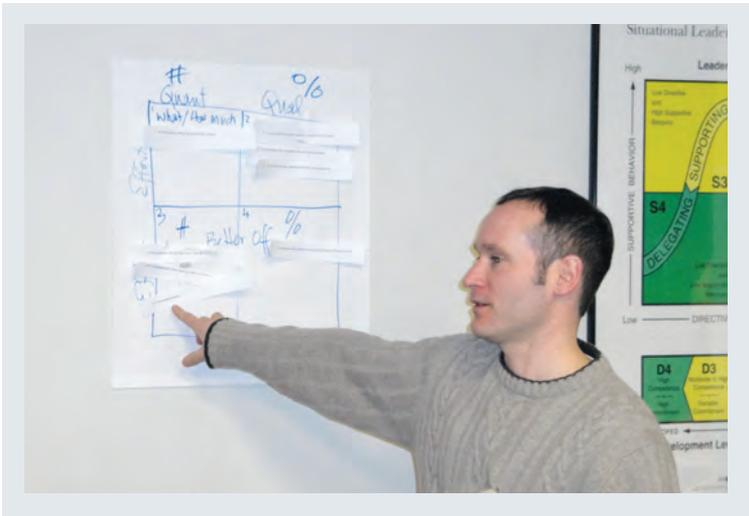
*The Write Source*

15<sup>th</sup> 9 a.m. to 3:30 p.m.

## Results-based Accountability: Making Measurable Differences in Programs and Communities

This introductory session is designed for teams of three or more people from an organization who want to apply the seven steps of Results-based Accountability (RBA) to improve the outcomes of people served in their programs and to inform decision making through data. Participants will apply the RBA approach to their own work and leave the session with performance measures they can use and information on implementation.

Presenter: Phyllis Rozansky, Principal  
*Pathways to Results, LLC*



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

## **Conflict Resolution**

Using an interactive approach, participants will learn how to manage conflict and move through challenges to achieve better outcomes. In addition to learning methods for identifying conflict, participants will gain insight into the different ways people approach and define conflict. Skills to manage conflict, such as active listening, will be highlighted.

Presenter: Samuel J. “Joe” Brummer, Associate Director  
*Community Mediation, Inc.*

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

## **Understanding Evidence-based Programs and How They Lead to Positive Outcomes (Part One)**

The Annie E. Casey Foundation is working to help systems and communities develop and utilize evidence-based programs and practices. One strategy to support this work is increasing the supply and utilization of evidence-based programs within child- and family-serving public systems. This workshop will provide participants with an explanation of how evidence-based programs (EBP) are defined, examples of their use, resources to identify and employ EBPs, and strategies to demonstrate the effectiveness of programs and services. In addition, this workshop will discuss how the Results-based Accountability framework relates to EBP.

Presenters: Renée Wilson-Simmons, Ph.D., Associate Director  
of the Evidence-Based Practice Group  
*The Annie E. Casey Foundation*

Yanique Redwood, PhD, MPH, Senior Associate  
for Health and Mental Health  
*The Annie E. Casey Foundation*

**20<sup>th</sup>** 9 a.m. to noon

## **Understanding Evidence-based Programs and How They Lead to Positive Outcomes (Part Two)**

A continuation of the workshop that began on May 19, 2011. Attendance at both sessions is required.

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

## **Effective Case Management Practices**

This session will clarify and illustrate effective practices in case management, such as the ones used by Casey Family Services. The session will focus on helping participants understand and learn comprehensive participant assessment, effective referral methods, and overall impactful case management. This session will be most useful for those who serve disadvantaged children, youth and families, former offenders, the unemployed, and other challenging populations.

Presenter: Stephanie Gosteli, Staff Development and Training Manager  
*The Annie E. Casey Foundation/Casey Family Services*

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

## **Lunch and Learn: Connecticut Department of Social Services and Modernizing Social Service Delivery**

Officials from the Connecticut Department of Social Services will discuss plans to modernize how it delivers services to state residents.



**12<sup>th</sup>** 10 a.m. to 3 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 website, an interactive resource available to all organizations and citizens interested in understanding the Greater New Haven and Valley Region through data.

Presenter: Mark Abraham, Executive Director  
*DataHaven*

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

## **Building Supervisory Relationships**

Many people are promoted to supervisory positions because of technical expertise. Once in these roles, they manage based on what they did or did not like in past supervisors. This workshop highlights the importance of building a partnership between supervisor and employee in order to create an environment of trust, responsibility, and personal accountability. Participants will learn clear and practical steps to establishing or enhancing the supervisory relationship. They will also learn how to define, communicate, and elicit performance expectations and working agreements. Participants will practice the art of constructive feedback to assist employees in reaching their full potential and to maximize opportunities for learning.

Presenter: Janet Waterston, Human Resources Consultant  
*Janet Waterston Consulting*

**DATE TO BE ANNOUNCED** noon to 1:30 p.m.

## **Lunch and Learn: The Connecticut State Budget and its Implications**

Join Connecticut state legislators and policy advocates in a panel discussion of the state's budget and its expected impact on organizations, programs, and services that work with vulnerable children and families.



# OCTOBER

**5<sup>th</sup>** 9 a.m. to 3:30 p.m.

## **Achieving Better Results for Children, Youth, and Families through Collaborative Partnerships**

This Results-based Accountability session is designed for teams of 4 to 5 members from a collaborative partnership that want to better align their actions to achieve greater results in their work with children, youth, or families. Teams will learn how to instill a results-based culture within their collaborative and to identify actions they can take to apply the seven steps of Results-based Accountability.

Presenter: Phyllis Rozansky, Principal  
*Pathways to Results, LLC*



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

### **An Introduction to Federal Grants (Part One)**

You hear claims that government money is available for all types of programs and projects. While there continues to be funding in very specific areas, the competition is fierce. Learn what it takes to seek federal, state, and local government grants for your organization in this two-day workshop. This learning opportunity – for executive directors, grant proposal writers, or fund development personnel with more than three years of experience preparing applications to foundations or corporations – will assist you with the following:

- Understand how government grants differ from foundation and corporate applications.
- Assess your organization's readiness to apply for government grants.
- Connect projects or programs to government funding requests.
- Find available federal grants through online resources and publications
- Review federal grant application, learning the language, and reading between the lines.
- Understand the process of preparing a federal grant application/proposal package.
- Learn how peer reviewers will see your proposal

Presenter: Diane Gedeon-Martin, President  
*The Write Source*

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

### **An Introduction to Federal Grants (Part Two)**

A continuation of the workshop that began on October 11, 2011. Attendance at both sessions is required.

# NOVEMBER

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

## **Becoming an Effective Advocate**

A strong advocacy effort is more important than ever with federal, state, and local budget cuts plaguing social services and programs across the board. An effective way to protect your clients and your programs is to champion your cause in the halls of power. In this session, participants will explore the personal and professional skills required to become an effective advocate. Participants will develop a strategy for their specific policy issues and leave the workshop with practical tools for successful advocacy.

Presenter: Frank Abdale, President

*Abdale Consulting*

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

## **Introduction to Social Media**

This workshop offers nonprofit decision makers a practical introduction to new media. Participants will explore several new media and Web 2.0 concepts, including tagging, social networking, dynamic vs. static websites, 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. Attendees will leave this course with a greater understanding of several web-based productivity and social media tools.

Presenter: J.R. Logan, Director of New Media Strategies

*United Way of Greater New Haven*

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

## **Lunch and Learn: Introduction to the Annie E. Casey Foundation's Juvenile Detention Alternatives Initiative**

The Juvenile Detention Alternatives Initiative (JDAI) has been implemented in more than 120 jurisdictions across 25 states. This system-reform process is designed to safely reduce a community's reliance on secure detention for young people and transform juvenile justice policy and practice. This session will examine detention reform as a platform for broader systems change; the JDAI process and its eight core strategies; results and innovations from two decades of practice; and the initiative's expansion to serve children with more extensive involvement in the system. *Presented by Gail Mumford, senior associate in the Juvenile Justice Strategy Group, at the Annie E. Casey Foundation.*



## PRESENTER BIOS

**Mark Abraham**, as executive director, is responsible for the management and development of DataHaven and for the delivery of multiple products and services that support civic action, planning, and research. An honors graduate of Yale University, he has held posts as a planner with the New York City 2012 Summer Olympic Games Bid Committee, as director of marketing for the New Haven architecture firm Svigals and Partners, and as associate at the consulting firm Holt, Wexler & Farnam, LLP.

**Frank Abdale** currently is a principal at Abdale Consulting. Most recently, he served as executive director of the Association of Nutrition Services Agencies, where he built an effective advocacy program. He developed and introduced legislation into both the House of Representatives and the Senate calling for a White House Conference on Food and Nutrition in 2010. He also founded the National Nutrition Collaborative, developed policy-related publications, coordinated a grassroots and national advocacy effort, and built partnerships to highlight the nutritional needs of the chronically ill.

**Samuel J. “Joe” Brummer**, an experienced trainer and mediator, is the associate executive director at Community Mediation, Inc. He has clocked hundreds of hours at the mediation table facilitating a wide variety of disputes, including landlord-tenant conflicts, neighborhood conflicts, civil lawsuits, and victim-offender mediation. Trained as a mediator at the Community Mediation Center of Rhode Island, he served on the organization’s Juvenile Restorative Justice Advisory Board. At the Institute for the Study and Practice of Nonviolence, where he also studied, Brummer worked with at-risk youth to teach nonviolence and peace-making skills.

**Diane Gedeon-Martin**, president of the Write Source, is a grants consultant with more than 200 clients in 23 states. 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 that creates an exceptional learning opportunity for participants. Gedeon-Martin currently is on faculty with the Center for Philanthropy at Indiana University, and also teaches for the Connecticut Association for Nonprofits and the Association of Fundraising Professionals (AFP) International.

**Stephanie Gosteli** is the training manager at Casey Family Services, the direct service agency of the Annie E. Casey Foundation. In addition to developing and implementing training programs for agency staff, she has taken the lead in

developing the organization's online training capacity. A licensed clinical social worker, Gostelli is an expert in using e-learning strategies to support the human services workforce.

**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 on best practices for nonprofits.

**Rafael López** is the associate director for Talent Management and Leadership Development at the Annie E. Casey Foundation. Prior to joining the Foundation, López served as the President and CEO of the Family League of Baltimore City, Inc. where he also served as a member of the Baltimore City Mayor's Cabinet. López is an experienced leader and manager with over sixteen years of experience in the public and social sectors where he has served in numerous roles at the city, county and state level. He earned a Master in Public Administration from Harvard University's Kennedy School of Government.

**Barbara Miller** is a partner in Management Solutions for Nonprofit Organizations, which provides consulting, training, and management services. She has developed strategic plans with health and human services agencies, arts organizations, library systems, literacy groups, public health departments, and early childhood learning organizations, among many others. She teaches strategic planning to nonprofit leaders, and was a contributor to *Strategic Planning for Nonprofit Organizations*, published by John Wiley and Sons. Previously, Miller was senior staff consultant at the Support Center for Nonprofit Management. She holds a master's in business administration from the University of California, Los Angeles.

**Gail Mumford** joined the Annie E. Casey Foundation in 2006 and currently serves as a senior associate in the Juvenile Justice Strategy Group. She oversees the ongoing management and expansion of the Foundation's Juvenile Detention Alternatives Initiative. Prior to joining Casey, Mumford was with the Missouri Division of Youth Services for 23 years. Her work there helped the state develop a nationally acclaimed juvenile justice model.

## PRESENTER BIOS (cont'd)

**John E. Padilla** is an associate director within the Center for Family Economic Success at the Annie E. Casey Foundation. He is responsible for managing a portfolio of national grants that supports organizations, programs, strategies, and initiatives that improve public policies and infrastructure for the delivery of workforce development training to low-income people. Prior to joining the Foundation, Padilla was 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.

**Yanique Redwood, Ph.D., MPH**, is the senior associate for health and mental health in the Evidence-Based Practice Group at the Annie E. Casey Foundation. She has extensive training and experience in community-based participatory research methods. She directed the implementation of a National Institutes of Health-sponsored community-academic partnership between Georgia State University Institute of Public Health and a south Atlanta community with the goal of reducing inequities in health and mental health outcomes. Her most significant work in Atlanta was the co-development of a community-led data collection effort and policy advocacy campaign to address built environment inequities and increase affordable housing opportunities for families with lower levels of income.

**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). 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.

**Kenya Rutland** has nearly 15 years of training and development experience creating healthy, high-performing individuals, groups, and organizations. His work focuses on change management, customer service, diversity and inclusion, leadership, and team development. He has worked with various types of organizations, including affinity groups, corporations, educational institutions, and government entities.

**Janet Waterston** of Janet Waterston Consulting is a human resources and organizational consultant with more than 20 years of experience in both the nonprofit and for-

profit sectors. Her consulting expertise includes the development of supervisors, leaders, and managers; employee relations; employment law; executive and management coaching; and executive transitions 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. She also has held senior and corporate human resources positions in the publishing and financial printing industries.

**Renée Wilson-Simmons** is a senior associate in the evidence-based practice group at the Annie E. Casey Foundation. She has more than 20 years of health promotion, community development, and high-risk behavior prevention experience. She has served as the director of the Health Promotion for Urban Youth Program at Boston City Hospital and as the principal investigator of the first Office of Minority Health-funded grant to develop a community-based coalition to prevent homicide in an African American community. She also was the director of a five-year National Institutes of Health study of the long-term impact of a comprehensive adolescent health initiative on reductions in risk behaviors associated with violence, substance abuse, and early and unprotected sexual activity among inner-city African American and Hispanic youth.

## 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.



The Annie E. Casey Foundation  
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Phone: 410.547.6600

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.



Casey Family Services  
127 Church Street  
New Haven, Connecticut  
06510

Phone: 203.401.6900

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