

SUMMIT AGENDA

7:30 a.m. to 8:15 a.m.

Registration & Breakfast

8:15 a.m. to 9:15 a.m.

General Session

Welcome from Shelley Hoss
Chair, Orange County Funders Roundtable, and
President, Orange County Community Foundation

A New Reality for the Non Profit Sector?

Keynote Presentation

Fred Ali
President and CEO, Weingart Foundation

9:30 a.m. to 10:30 a.m.

Leadership Discussion Sessions

CEOs

Board Members

Facilitated by Roundtable Members and
Nonprofit Leaders

10:40 a.m. to 11:50 a.m.

Breakout Sessions

COHORT A: Managing in Tough Times

COHORT B: Strategic Collaboration & Restructuring

COHORT C: Maximizing Your People ROI

David Greco, Vice President, Nonprofit Finance Fund
Vance Yoshida, Senior Manager, La Piana Consulting
Margaret Graziano, CEO, Keen Hire

12:00 p.m. to 1:15 p.m.

Lunch

Introduction from Maria Chavez-Wilcox
President and CEO, Orange County United Way

Leading in Turbulent Times

Rick Wartzman
Executive Director, Drucker Institute,
Claremont Graduate University

1:20 p.m. to 2:30 p.m.

Breakout Sessions

COHORT A: Strategic Collaboration & Restructuring

COHORT B: Maximizing Your People ROI

COHORT C: Managing in Tough Times

Vance Yoshida, Senior Manager, La Piana Consulting
Margaret Graziano, CEO, Keen Hire
David Greco, Vice President, Nonprofit Finance Fund

2:40 p.m. to 3:50 p.m.

Breakout Sessions

COHORT A: Maximizing Your People ROI

COHORT B: Managing in Tough Times

COHORT C: Strategic Collaboration & Restructuring

Margaret Graziano, CEO, Keen Hire
David Greco, Vice President, Nonprofit Finance Fund
Vance Yoshida, Senior Manager, La Piana Consulting

4:00 to 4:45 p.m.

Open Forum Discussion

Facilitated by Michael Ruane
Executive Director, Children and Families Commission
of Orange County

4:45 to 5:30 p.m.

Hosted Reception