



CATHOLIC LEADERSHIP PROGRAM

**An Executive Program for
Catholic Leadership**

**The Mendoza College of Business
of the University of Notre Dame**

July 11-21, 2011





CATHOLIC LEADERSHIP PROGRAM

Monday, July 11th

Welcome Introductions by Tom Harvey and Marc Hardy

6:00—8:00 PM—Reception at:

**The Morris Inn
Donor Room
Notre Dame Campus**

Invited Guest Speaker: Dean Carolyn Woo



Dr. Woo assumed the deanship of the Mendoza College of Business at the University of Notre Dame in 1997. Before then, she served as Associate Executive Vice President for Academic Affairs at Purdue University. She joined Purdue as assistant professor in 1981, became full professor in 1991 and directed the Professional Master's Programs in the Krannert School of Management from 1993 to 1995.



CATHOLIC LEADERSHIP PROGRAM

Tuesday, July 12th

Classes this week will be held at the Mendoza College of Business Building, Room 133

8:30 AM - 12:00 PM—Behavioral Understanding: The Key to Influence and Job Success
Presenter: Jimmie Alford, Founder and Chairman of The Alford Group

This session will utilize the DISC Profile System to assist participants in better understanding their behavior, job and team patterns and others behavior. DISC creates an understanding of dynamics that influence communication and positive relationships. The foundation of success lies in understanding self, understanding others and realizing the impact of your behavior on people. DISC focuses on four behavioral dimensions including D: Dominance, I: Influence, S: Steadiness, and C: Conscientiousness.



After serving 16 years with the Boys & Girls Clubs of Chicago, Alford founded his own fundraising consulting firm, Alford & Associates in 1979. The firm, now known as The Alford Group, quickly grew into one of the premier consulting firms in the United States and has served more than 2,300 nonprofit clients since its creation. Under his leadership, the firm was awarded Bank of America's 1994 Small Business of the Year Award. While he transferred ownership of the firm to a group of senior management in 2006, he continues to consult with nonprofits through the firm and lend his experience and expertise. He is the executive in residence at North Park University's Axelson Center for Nonprofit Management and teaches graduate courses. In 2007 he was awarded an honorary Doctor of Laws degree from North Park University as well as an honorary Doctor of Humane Letters degree from Aurora University. He has been recognized twice by The NonProfit Times as "one of the 50 most influential people in the nonprofit sector." In 2009, the Association of Fundraising Professionals named Jimmie R. Alford the recipient of the prestigious Chair's Award for Outstanding Service, given to individuals for exceptional service to AFP, the fundraising profession and the philanthropic community.

Noon—Lunch

1:00 PM - 4:30 PM—Creating a Philanthropic Culture
Presenter: Jimmie Alford, Founder and Chairman of The Alford Group

This highly dynamic, interactive session will explore philanthropic giving trends, board and volunteer engagement, organizational readiness and execution in developing a culture of philanthropy. Donor motivation, engagement strategies, prospect rating and screening mechanisms will all add to a framework for effective philanthropic advancement in a highly competitive environment.



CATHOLIC LEADERSHIP PROGRAM

Wednesday, July 13th

8:30 AM - 12:00 PM—Canon and Civil Law 101

Presenter: Sister Melanie Di Pietro

This session will serve as an introduction to the principles of canon law related to the lay person's participation in various apostolates in the church carried on in the diocese/parish. This session will explain the fundamental difference between the governance and management structures assumed in canon law and general practices in American law. The session will explain the difference between the canonical structure of the parish/diocese and the civil law structure that carries on the business affairs of the diocese/parish. This session will explain the difference between performing the activities in the diocesan/parish civil law structure and in a separate corporation.



Sister Melanie Di Pietro is the Director of Seton Hall University Law School Center for Religiously Affiliated Corporations where she also teaches exempt corporations. Before joining the faculty at Seton Hall, Sister Melanie was a shareholder in the law firm of Buchanan Ingersoll and Rooney where she worked extensively with non profit corporations in matters involving governance structures, mergers, joint ventures and litigation. In addition to her law degree, Sister has a doctorate in canon law from the University of St. Thomas in Rome. Her dissertation addressed the interrelationship between American law and canon law in the creation of new canonical entities, public juridic persons, that are now being used as new models of canonical governance for schools and other apostolates formerly the canonical responsibility of religious institutes and the diocese or parish. She is an elected member of the American Law Institute and serves on the Members' Consulting Group for the revision of Principles of the Law of Nonprofit Organizations. She has served on numerous college, healthcare, social service and community organizations boards including the Urban League, the Human Relations Commission of the City of Pittsburgh and the Board of Public Welfare, Commonwealth of Pennsylvania. She currently serves on the Legal Commission of Caritas Internationalis, the umbrella organization for Catholic Charities organizations throughout the world which is located in Rome, Italy and Dominican Health Services, Jackson, Mississippi. She is an author and speaker, both nationally and internationally, on matters concerning non-profit governance, especially in joint ventures between religiously affiliated corporations and community organizations and multi-corporate systems.

Noon—Lunch



CATHOLIC LEADERSHIP PROGRAM

Wednesday, July 13th (Cont.)

1:00 PM - 4:30 PM—Canon and Civil Law 101
Presenter: Sister Melanie Di Pietro

This session will be a continuation of the morning session.

Thursday, July 14th

8:30 AM - 12:00 PM—American Nonprofit Law and Catholic Organization Governance Trends
Presenter: Sister Melanie Di Pietro

This session will focus on the work of the apostolate carried on in a separate corporation that is related to the diocese/parish or one that is related to a new canonical entity made up of lay persons. This session will focus on the single board or two tiered governance structures of the corporation carrying on the work of an apostolate and explain the relationship of Members to Trustees as well as the interplay among Members, Trustee, the Bishop, Diocesan staff or to the new lay canonical entity. The session will describe the federal tax status of the corporation and discuss the duties of obedience, care and loyalty of trustees (and Members?) and conflicts of interest. The session will discuss the requirement of independent judgment of trustees and to whom duties of obedience and loyalty are owed.

Noon—Lunch

1:00 PM - 4:30 PM—The Nonprofit Board of Directors: A Matter of Shared Responsibility
Presenter: Mary Heidkamp, Dynamic Insights International

This session will focus on the role and responsibility of the nonprofit board as a corporate entity with responsibility shared by all of its members. For a board to thrive in these times, understanding the “who” to recruit for the board is as essential as “how” to recruit. Providing orientation to the individual member’s role, in the context of the corporate role, is an ongoing process. This session will provide practical tools for evaluating boards and board members, training board members, as well as the relationship between the board and the executive director.



Dr. Mary Heidkamp has thirty years of experience in leading organizations, including ten years as the Director for the Campaign for Human Development in Chicago. In her role as president of Dynamic Insights International, she has consulted with human service and advocacy organizations throughout the United States. She teaches various nonprofit topics including Strategic Management and Planning, Board Development, Operations Management and Organizational Change always including practical tools for immediate application. She is an author and holds a doctorate from McCormick Theological Seminary with a specialization in organizational change and executive leadership.



CATHOLIC LEADERSHIP PROGRAM

Friday, July 15th

8:30 AM - 12:00 PM—Budgeting and Finance
Presenter: Professor Ed Hums, University of Notre Dame

This course is designed to provide very practical and fundamental aspects to accounting and budgeting to assist managers in analyzing departmental revenues and expenses and how to create a budget. Ed and Steve will teach as a team, one as an academic and the other from a management practice perspective. Potential Topics: concepts of accrual and cash-basis accounting, regulatory accounting matters, financial reporting issues, why cash flow is important, how to assemble a budget, analyze and interpret budget variances, financial and regulatory audits, and related issues.



Ed Hums holds a BBA from the University of Notre Dame, both an MBA and MSBA from Indiana University, and is a C.P.A. in the State of Indiana. His expertise is in the areas of budgeting, accounting information systems and nonprofit financial management. Ed is in his twentieth year of teaching at Notre Dame with the last seven years as a full-time faculty member. Prior to teaching full-time, Ed spent 26 years in various administrative roles at Notre Dame. He has been the recipient of multiple awards for his teaching.

Noon—Lunch



CATHOLIC LEADERSHIP PROGRAM

Friday, July 15th (Cont.)

1:00 - 4:30 AM—Dying to Live: A Theology of Migration
Presenter: Fr. Daniel Groody, CSC, University of Notre Dame

Immigration is a complex issue that is changing the face of cultures worldwide. In the United States, it is often controversial with many social, economic, political and even religious implications. In the debate, what often gets lost are the human issues at stake. This presentation will include a film called “Dying to Live,” which is a profound look at the human face of the migrant. It explores who these people are, why they leave their homes and what they face in their journey. Drawing on the insights of Pulitzer Prize winning photographers, theologians, church and congressional leaders, activists, musicians and the immigrants themselves, this film explores the places of conflict, pain and hope along the US-Mexico border. It is a reflection on the human struggle for a more dignified life and the search to find God in the midst of it all.



Rev. Daniel G. Groody, Director of the Institute’s Center for Latino Spirituality and Culture and Assistant Professor of Theology, has spent many years working in Latin America, particularly along the US-Mexican Border, and is the author of various books and articles which have been translated into five languages. These include *Border of Death, Valley of Life: An Immigrant Journey of Heart and Spirit* (2002) and *Globalization, Spirituality, and Justice* (2007). He is also editor of *The Option for the Poor in Christian Theology* (2007), and co-editor of *A Promised Land, A Perilous Journey: Theological Perspectives on Migration* (2008). Groody holds a BA from the University of Notre Dame, a Master of Divinity and a Licentiate in Sacred Theology from

the Jesuit School of Theology at Berkeley, and a PhD from the Graduate Theological Union. He is also the executive producer of various films and documentaries, including *Strangers No Longer* and the award-winning *Dying to Live: A Migrant’s Journey*. He teaches courses in US Latino spirituality, globalization, Christian spirituality, and social justice and lectures widely in the United States as well as Latin America, Europe, and Asia.



CATHOLIC LEADERSHIP PROGRAM

Saturday, July 16th

9:00 AM - 12:00 PM—Understanding the U.S. Latino Population

Presenter: Allert Brown-Gort, University of Notre Dame

This session will serve as an introduction to the Latino population of the United States, and is designed to provide a practical understanding of how to engage these communities. Latinos are at once the oldest and newest immigrant groups in our country, and are poised to become over 25 percent of the population by 2050. They are also now the fastest growing segment of the U.S. Catholic Church. What is the significance of the growth of this population? What are the barriers to integration? What does the future hold for the nation and the Church?



Associate Director Allert Brown-Gort is responsible for the management of the Institute. A citizen of both the United States and Mexico, he has worked at the University of Texas at Austin, the Autonomous Technological Institute of Mexico, and Televisa in Mexico City, and at Columbia University. In these capacities he has worked on Latino, NAFTA, and Latin American issues. His major research interests are immigration policy and issues of national culture and psychology in the political arena. He has served as an advisor to the US Senate Hispanic Task Force, and his op-eds on immigration issues have appeared in the *Boston Globe*, *Chicago Tribune*, *Dallas Morning News*, and *Indianapolis Star*. Most recently, he co-authored a policy brief describing the potential effects of proposed legislation aimed at controlling unauthorized immigration in Indiana.

Noon—Lunch

Sunday, July 17th

Day of Worship/Mass



CATHOLIC LEADERSHIP PROGRAM

Monday, July 18th

8:30 AM - 12:00 PM—Program Evaluation Capacity Building
Presenter: Sal Alaimo, Ph.D., Grand Valley State University

Nonprofit organizations are attempting to respond to the increasing call for demonstrating program effectiveness. This workshop helps nonprofit leaders and managers prepare their organizations to have their programs evaluated with regard to leadership, organizational culture, resources, structures and organizational context. Organizations that invest in evaluation capacity building will be more likely to save resources, increase the quality of their evaluations, and prepare their organizations for long-term engagement in program evaluation.



Sal Alaimo is an Assistant Professor in the School of Public, Nonprofit and Health Administration at Grand Valley State University. He has a Ph.D. in Philanthropic Studies from Indiana University and a Master's degree in Urban Studies/Nonprofit Management from Georgia State University. Dr. Alaimo has worked for nonprofit organizations for 9 years and has consulted with nonprofits for 10 years, specializing in evaluation, strategic planning and volunteer management. His most recent publications include the book chapters “Nonprofits and Evaluation: Managing Expectations from the Leader’s Perspective” in the *Jossey-Bass Reader on Nonprofit and Public Leadership*, and “Contracting out” in *Handbook of Research on Nonprofit Economics*

and Management.

Noon—Lunch



CATHOLIC LEADERSHIP PROGRAM

Monday, July 18th (Cont.)

**1:00 PM - 4:30 PM—Mission Statement to Praxis
Presenter: David Kiely, Silver Fox Advising Inc.**

Praxis, in Greek, is the process by which a mission is enacted or practiced or realized. It refers to the acts of applying, or practicing ideas. Christ established the mission for the Church to put into practice, but often the mission fails to get realized, because of a lack of a clear action plan. Partnering the strategies and implementation of strategy planning with the concepts of strategic positioning (devising of the desired future position of the organization on the basis of present and foreseeable developments, and the making of plans to realize that position) is vital to the future of the Church. This partnership of strategic thinking is aimed at ensuring the sustainability of the organization and the mission. We will focus not only on strategic thinking, but the essential accountability to ensure implementation. We will review strategic thinking/planning training in a variety of training formats and focus levels. Implementation requires focusing on what is to be done in order to realize that positioning. Strategic planning implementation is “painting a picture” of where the organization will end up and the anticipated outcomes. We will explore assuring that the picture is one of reality and one which has team buy-in and accountability.



David Ray Kiely is the Managing Partner of Silver Fox Advising, Inc., a consulting firm of nonprofit and leadership issues. He has over 35 years of leading nonprofit organizations committed to providing residential, day training, employment, service coordination and in-home support services for persons with developmental disabilities in four different states. He was the Executive Director of a state-wide trade association. In his various leadership roles, David helped establish strategies for lobbying all segments and levels of government. He has served on national governmental affair committees. He was appointed to a subcommittee of the U.S. Department of Labor. He earned a Masters of Divinity from New York Theological Seminary.



CATHOLIC LEADERSHIP PROGRAM

Tuesday, July 19th

8:30 AM - 12:00 PM—Employment Law
Presenter: Barbara Fick, University of Notre Dame

The morning session will be focused on a review of federal laws affecting the employment relationship: NLRA, Title VII, ADEA, ADA and the FMLA.



Barbara J. Fick joined the Notre Dame Law School faculty in 1983 as a visiting associate professor of law, and became a permanent member of the faculty one year later. She earned her B.A. from Creighton University in 1972 and her J.D. from the University of Pennsylvania in 1976. A member of the Wisconsin Bar since 1976, Professor Fick has worked as an associate at the Milwaukee firm of Foley & Lardner (1976-78) and as a field attorney for the National Labor Relations Board in Philadelphia (1978-83). While at the NLRB, she also lectured in law at St. Joseph's University in Philadelphia (1981-82). Professor Fick's teaching and scholarship concentrate on various aspects of labor law such as employment discrimination, individual rights in the workplace, and international and comparative labor law. Since 1995, she has worked with the American Center for International Labor Solidarity advising and teaching trade union leaders in Central and Eastern Europe on issues relating to protecting worker rights and ensuring domestic compliance with international labor standards. In the spring semester of 2000, Professor Fick served as a visiting professor of law at Katholieke Universiteit Leuven (Belgium) .

Noon—Lunch

1:00 PM - 4:30 PM—Employment Law
Presenter: Michael Richardson, Franczek Radelet P.C.

The afternoon session will be a discussion of state laws affecting the employment relationship: wage and hour law, leave law, personnel records law, human rights law, public policy exception to employment-at-will and the enforceability of employee handbooks.



CATHOLIC LEADERSHIP PROGRAM

Wednesday, July 20th

8:30 AM - 12:00 PM—Fund Development
Presenter: Mark Germano, President, Creating Solutions

Every non-profit organization in the United States and the World relies to a greater or lesser extent on philanthropic contributions. The United States has over 1,424,000 501(c)3 organizations, and the number is climbing. This session is designed to give you and your organization practical, straight-forward tools and techniques that you can implement immediately to help you create a culture of philanthropy. This will be an interactive session where participants will be exposed to the latest research on donor giving patterns and motivations, and what they must do to create alignment between the donor and their organization.



Mark C. Germano is a seasoned nonprofit executive with over 30 years of experience either working for or consulting to nonprofit organizations. He has raised over \$650,000,000 in his career, securing numerous 6, 7, and 8 figure gifts. Mark has been able to consistently build strong donor relationships with high net worth individuals, corporate and civic leaders. He has been an innovator in the field bringing such things as on-line giving into the nonprofit field, implementing program outcome measurements into the development efforts, and building effective strategies to work with older donors. Mark has worked at the local, regional, State and National levels in leadership roles in a variety of organizations that include: social services, education, faith-based, and voluntary health organizations. Mark is the President of Creating Solutions which is a consulting firm committed to improving the financial and operational success of non-profit organizations.

Noon—Lunch

1:00 PM - 4:30 PM—Fund Development
Presenter: Mark Germano

This session will be a continuation of the morning session.

6:00 PM—Final Banquet



CATHOLIC LEADERSHIP PROGRAM

Thursday, July 21st

8:30 AM - 12:00 PM—Nonprofit Board Governance: A Design for Quality
Presenter: Tom Harvey, University of Notre Dame

Prior to this session, Thomas Harvey will survey all the participants in the Catholic Leadership Program on real issues facing their own nonprofit boards. Specific information will be kept confidential, but the material will be summarized into an agenda for this all morning session to maximize the value of the class. Participants are encouraged to share successes, problems, current challenges or structural concerns in filling out the survey. They will also have the opportunity during the session to work in teams to suggest solutions to the identified problems, and to determine how successful board dynamics can be replicated in all participating agencies. Harvey is the Director of Notre Dame's Master of Nonprofit Administration Program and the co-author of the recently published book, *Nonprofit Governance*.



Thomas J. Harvey is an internationally recognized leader in social welfare. Over the course of Mr. Harvey's 40 year career, he has led local and national organizations committed to confronting the challenges of poverty, discrimination, health care, and human services. In October 2003, he was chosen by the Council on Social Work Education as one of 50 pioneers within the field of social work during the past 50 years to be highlighted in its published work, *Celebrating Social Work: Faces and Voices of the Formative Years*. From 1998 until 2005, Mr. Harvey served as the Senior Vice President of at the Alliance for Children and Families, a Milwaukee-based international association of more than 300 private, nonprofit child-and family-serving agencies which strengthen the lives of over 5 million disadvantaged families annually. Earlier in his career, he served as President and CEO of Catholic Charities USA, one of the nation's largest networks of social service organizations. Currently he is the Director of a special master degree program for nonprofit leaders at the University of Notre Dame's Mendoza College of Business. Mr. Harvey received a M.S. from Columbia University School of Social Work; a master's degree and B.A in Theology from the Gregorian University in Rome, Italy; and a B.A. in Philosophy from St. Charles Borromeo College in Philadelphia. In 1977, he also earned a Certificate in Nonprofit Management from the Wharton School of Business at the University of Pennsylvania.

Noon—Lunch

University of Notre Dame—Nonprofit Business Excellence Certification Program
July 11—21, 2011
University of Notre Dame
Notre Dame, IN 46556

Registration Guidelines

- ◇ This instruction and all materials for this program are being funded by a private donor. There will be a program fee of **\$475** which covers the cost of the reception dinner, breakfast, lunch and snacks during the program, 4 dinners at South Dining Hall, and a final banquet. Meals on Saturday and Sunday will be the responsibility of the participant.
- ◇ The Catholic Leadership Program will accommodate a maximum of 45 individuals.
- ◇ Registrations will be processed on a first come-first serve basis, and will be accepted until June 15.
- ◇ **Accommodations (2 options):** Air-conditioned residence halls are available the nights of July 11 through July 20. The price for a single is \$52 per night and a double is \$40 per person/per night. You must register for the residence halls on-line at: <http://conferences.nd.edu/> and click on “Event Calendar” then click on the conference. We also have blocked a number of rooms at the Inn at St Mary’s (<http://innatsaintmarys-px.trvlclick.com/index.cfm>). They provide shuttle service to and from the University of Notre Dame. Room rates are \$109/night. Please call 877-567-1438 if you wish to stay at the Inn.

Registration

Participant’s Full Name

Participant’s Title

Organization Name

Mailing Address

City, State, Zip

Phone Number

Fax Number

E-Mail Address

Please return this Registration form along with a check for \$475 payable to the **University of Notre Dame** (credit cards not accepted) to:

University of Notre Dame
Nonprofit Executive Programs
c/o: Kim Brumbaugh
340 Mendoza College of Business
Notre Dame, IN 46556

For additional information, please contact Marc Hardy at 574-631-1087 or email mhardy@nd.edu.