

National Leadership Conference



Relentless Possibilities 2017

Wednesday, October 25, 2017:

- 2:15-2:30 p.m.** Board buses at hotel for Mother Caroline Academy (MCA)
- 2:30-3:00 p.m.** Travel to MCA
- 3:00-3:15 p.m.** Welcome Remarks from Nancy Langer and Ed Hudner
Opening Prayer
- 3:15-5:00 p.m.** General Session:

Investing in Your Impact: A Philanthropic Focus

facilitated by Dr. Susan Raymond, Changing Our World

The nature of philanthropy is changing. Altruism is being replaced with expectation. People now give, not because they feel they must, but because they believe that their commitment will be used to make a significant difference. "Giving" is now seen as more "investment" than "charity." Donors increasingly expect quantitative measures of results and impacts. For education, these measures are typical for the classroom, but the classroom is only part of the mission. Given the philanthropic dependency of NativityMiguel Schools, how can a focus on performance fulfill its purpose, increase investment and deliver value for the larger mission of your school?

5:00-6:00 p.m. Social Hour & Tour of School

6:00-7:00 p.m. Dinner

7:00-8:00 p.m. Keynote Address

Our Greatest & Best Inheritance: Private, Faith-Filled Schools in a New Era of Educational Choice

facilitated by John Schoenig, University of Notre Dame

This session will explore the unique and integral role that the Catholic school community plays in the ongoing transformation of K-12 schooling. Our particular focus will be on the enactment and implementation of instruments of public policy (such as vouchers, tax credit scholarships, and education savings accounts) that can

help marginalized families gain access to a quality Catholic school. We will explore the current context for such policy, emerging challenges and opportunities, and effective advocacy and implementation strategies.

8:00 p.m. Board Buses for Hotel

Thursday, October 26, 2017:

8:00 a.m. Board Buses for Epiphany School

8:30-8:45 a.m. Morning Prayer

8:45-10:30 a.m. General Session

Becoming Who You Are: A Lifecycles Approach to Nonprofit Capacity

facilitated by Maria Fibiger, Master Consultant for the Nonprofit Cycles Institute

This session, based on Susan Kenny Steven's widely popular book, *Nonprofit Lifecycles*, will provide a practical way to think about strengthening your organizational capacity, no matter what your school's age or size. Using seven lifecycle stages to describe the predictable growing pains nonprofits experience at each stage of development, this session will present concepts especially relevant to board members, school presidents and development directors. Learn how to self-assess your organization's management, governance, financial resources, and administrative structures as the vital support systems for your important mission and programs.

10:30-10:45 a.m. Break & Transition

10:45-11:45 a.m. School Case Studies:

Applying strategies and processes that facilitate honest analysis and assessment of whether a school has been accomplishing what it set out to accomplish and develop a response to the "What next?" question:

1. Innovative Mental Health Interventions at Epiphany School

Facilitated by Emily Bautista, MA, Epiphany School, and Adam Silk, MD, Harvard Medical School

This session will present several new approaches to supporting students' social and emotional growth at the Epiphany School. After eight years of experience with teacher-led student discussion groups, we will also discuss our use of the computerized Holistic Student Assessment to identify and track student strengths and weaknesses across the school year. Finally, we will present RELATE, an initiative to help teaching fellows become more skilled at understanding and leading groups of students.

2. Ensuring Sustainability through Thoughtful Engagement

Facilitated by Theresa Flynn Houghton (Head of School) and Alex Goldberg, Director of Development DeMarillac Academy, San Francisco, CA

After a year of gathering input from key stakeholders regarding questions critical to meeting outcomes of the Mission, De Marillac Academy developed a Theory of Change in order to promote social change. De Marillac Academy's Theory of Change engages every stakeholder and provides the organization a framework for how to break the cycle of poverty through education.

11:45 -1:00 p.m. **Lunch**
Tour of School

1:00-2:30 p.m. **Best Practice Session 1 - Learning from External Expertise**
Participants can choose to attend one of the following sessions

1. Building a Pipeline of Major Donor Prospects

Facilitated by Larry Furey, Partners in Mission

Building a pipeline of major donor prospects is always at the top of the “to do” list for the Advancement Office. Many of these prospects get identified through their history of annual giving to your school. But do you have these prospects organized in a way that optimizes your efforts to maximize their giving potential and position them for a major gift to your school? Developing a prospect list will help you do that. In this session, we will discuss: how to identify and rate prospects for your portfolio through informal and formal screening; best practices for “moves management” with prospects in your portfolio that will strengthen the prospect’s relationship with your school and guide them to their maximum giving potential; how to determine readiness for a larger ask for a major gift initiative while maintaining their annual giving commitment

2. Introducing campaigns without compromising your annual efforts

Facilitated by Brian Nevins, CSS Fundraising

As institutions consider launching special campaigns for capital, programmatic and endowment needs, it is critical to understand how to protect ongoing fundraising activity. In the age of “comprehensive campaigns” for major institutions, this session will review how best to position a campaign for your school. By exploring best practices, and benefiting from the example of others, this session should provide attendees with the best way to consider how best to introduce a successful campaign while keeping a strong ongoing annual fundraising program.

3. Institution Builder vs. Fundraiser

Facilitated by Bob Regan, Carney Sandoe and Associates

In his recent blog post entitled, “*Fundraiser vs. Institution Builder – A Preferred Leadership Profile for Catholic Schools*”, Bob Regan argues that fundraising alone, while necessary and vital, is not sufficient in achieving enduring, transformational change. Fundraising can get you to another day but not to a different place. Instead, he proposes a more holistic and strategic approach to leadership, one that involves building institutional vitality from the inside out and bottom up through a fusion of shared organizational interests. This is accomplished by focusing more broadly on enrollments, faith identity, and the quality of the student experience. Bob refers to this as “I-B” leadership (Institution Builder). Depending on the leadership structure of the school, especially those operating in the President/Principal Model, this is a head of school profile that requires a much different mindset than Chief Fundraiser. Fundraising is a skill and can be learned. I-B leadership is more of an executive trait or disposition, intrinsic to the profile, and a powerful asset to faith-based, private schools.

4. Expanding the Definition of Student Success: Lessons learned from Transforming Education’s work measuring student Mindsets, Essential Skills and Habits

Facilitated by Julia Travers Rickert, Transforming Education

Many high-performing, high-expectations schools with student achievement goals of 100% enrollment in 4-year colleges are rethinking how they prepare and support their students for success in completing college and navigating career and civic life. These schools are expanding their definition of student success beyond academics

to include the research-backed Mindsets, Essential Skills and Habits (MESH) that align with both the school's mission and long term success outcomes. We will first look at the research base for how MESH impacts long term student success, how MESH can be measured, and how high-performing urban schools are using this data to better support their students. We will then consider, from both a faith-based and research-based perspective, how NativityMiguel Schools assess the “intangible” qualities of students and impact the character formation of the students we serve.

2:30-3:00 p.m. Break & Transition

3:00-4:00 p.m. Best Practice Session 2 - Sharing Internal Expertise

Participants can choose to attend one of following sessions:

1. One Day Giving

Facilitated by Michael Motyl, Head of School, Guadalupe Regional School

Focus will be on planning and executing a successful campaign while exploring effective strategies and timelines, leveraging community partnerships, and implementing structures to maximize impact. This session is open to those who already have launched One-Day Giving campaigns or those who are exploring the possibility.

2. Special Events

Facilitated by Lori Britton, Chief Development Officer, Epiphany School

Events are a means to an end. They should help your school make friends who become loyal supporters over time. Come to this session to learn about and explore the “anatomy” of successful fundraising events. From concept to implementation and the do’s and don’ts of corporate sponsorship, this lively session will help you think through your fundraising event implementation, day of event logistics, and opportunities for follow-up to stay engaged with event attendees.

3. Student Sponsorship

Facilitated by Carolyn Becic, Head of School, St. Andrew Nativity Portland, Carol Nord, Head of School, Nativity Academy at St. Boniface

Nativity and Miguel Schools have used a major gift technique of asking donors to sponsor a student’s tuition very successfully. Join us to discuss this strategy and how to improve the sponsor a student program at your school.

4. Here's How to Reach Me

Facilitated by Glenn Winfree, Head of School, Covenant Prep

Learn how to communicate with impact with your various constituencies: students, parents, trustees, donors and volunteers. Learn to confidently enter their world and speak their language. This is an introduction to the Process Communication Model, a language-based personality model used by educators, business leaders, clergy and counselors worldwide.

5. Board Members: Give and Get Policies

Facilitated by David Kasievich, Head of School, St. James School

What is the most successful model for the board give or get policy? How do you set the amount? Is it: "Give until it hurts?" or "Give an amount that is significant to you?" And how do you reinforce the policy you set? Let's talk about what's working and what's not.

6. Embracing Failure

Facilitated by Mike Maruca, Head of School, Anna Julia Cooper School

In an outcomes-driven age, how do we handle not-so-great outcomes? 100% high school or college graduation rate is what our schools strive for, but it is not the reality. Forces outside of our control can change the trajectory of our students' and families' lives. We can view this as a failure on our part or learn to embrace these situation to better understand our schools' impact on our communities.

4:00-5:00 p.m. Structured Networking Circles

**5:00 p.m. Conclude for Day
Board Buses for Hotel**

Evening Dinner on Your Own

Friday, October 27, 2017: held at hotel

8:15-8:30 a.m. Morning Prayer

8:30-8:45 a.m. A Look from the Other Side address by Alex Zequeira
Message from former NativityMiguel Coalition's Board President

8:45 -10:30 a.m. General Session

Designing Change in Catholic Schools: An Executive Approach to Improving Professional Capital

Facilitated by Kristin Melley, Boston College

This final session provides participants with the space and framework to transfer their learning and refined goals from the previous day's' workshops into active leadership practice. Leaders will organize their personnel resources and commitments toward improvement into an effective framework to help define and power school change (and no, this is not the SWOT analysis). Develop improvement strategies with an educational professional framework, transfer conference learning into the culture of your school and recognize assets and opportunities at a systems' level to invite positive change.

10:30-11:00 a.m. Closing Prayer & Farewell

Speaker Bios:

Maria Fibiger, NonProfit Lifecycle Institute

Maria Fibiger is an experienced nonprofit management consultant and President of Three Dog Consulting Inc. where she provides organizational capacity building services including: fund development planning, business planning and board development. She served in executive and board leadership positions, and has a deep passion and understanding of the importance of nonprofit organizations within the framework of a community's socio-economic stability and positive growth. She holds a Bachelor of Science in Public Administration with a Certification in Nonprofit Management & Organizational Development from the University of Illinois at Chicago. Maria is a Lifecycle Master Consultant and has conducted five Lifecycle Assessments as part of her work with the Gifford Foundation's ADVANS Program. She also leads the Gifford Foundation's POWER capacity building program for Start-up organizations.

Larry Furey, founder and partner of Partners in Mission

Partners in Mission is a full-service consulting firm focused exclusively on developing excellence in Catholic school advancement and leadership. Larry Furey brings senior level management experience and over twenty-three years of development knowledge to **Partners in Mission**. Larry provides strategic direction in all areas of advancement with a proven record of success in enrollment management, on-site capital campaign management, major gift solicitation, planned giving and endowment programs, annual giving, boards and volunteers, communications, and advancement operations. Larry brings a sense of confidence and stability to the Catholic schools, dioceses and religious communities he works with, helping them set high goals and giving them the tools to achieve them. Larry is currently providing comprehensive advancement services to Catholic schools, dioceses and religious organizations throughout the United States.

Kristin Melley, Boston College

Kristin joined the Roche Center for Catholic Education in the fall of 2011 as an Associate Director focusing on professional development and brings 13 years of education experience, as both a classroom teacher and administrator, to her position. For six years she served as the director of a national center for Catholic schools and students. She is passionate about serving the mission of Catholic schools and empowering Catholic school leaders to excel in the many roles they hold. Kristin holds a B.A. from Wheaton College in Norton, MA and an M.A. in theology from Harvard University.

Brian Nevins, CCS Fundraising

Community Counseling Services (CCS) is a strategic fundraising firm that partners with non-profits for transformational change. They plan, manage, and implement programs that achieve fundraising goals and mission impact. Principal and Managing Director Brian Nevins has provided professional counsel and service to education, healthcare, conservation, advocacy, and international organizations. Since joining CCS in 1990, Brian has had extensive experience supporting clients in achieving their visions and dreams. For Brian, raising funds for many different clients for over 20 years has been a personally rewarding experience.

Bob Regan, Carney, Sandoe, and Associates

As head of the Catholic Schools Practice at Carney, Sandoe & Associates, Bob oversees all Catholic school leadership searches and will also discuss new developments and trends and answer any questions you have. Bob taught, coached, and served as dormitory master at Trinity-Pawling School in New York. He also worked as teacher, coach, and housemaster at Lawrenceville School in New Jersey, and as Director, Executive Programs at Digital Equipment Corporation. He was President & CEO at New England College of Finance, and served as Director, Office of College & Career Connections for Boston Public Schools. He was Executive Director, Institutional Advancement

and co-creator, Foundation Year at Northeastern University College of Professional Studies. He served as President of J.K. Mullen High School (Christian Brothers) in Denver, CO, and as President, Urban College of Boston.

Dr. Susan Raymond, Changing Our World

At Changing Our World, Dr. Raymond is responsible for designing and conducting business operating environment research for both nonprofits and foundations, as well as developing business plans and program evaluations for new and existing institutions. Some of Susan's clients have included The National 4-H Council, The Salvation Army, The US Fund for UNICEF, and St. John's University, Genesis Philanthropy, and the Medical Enterprise Technology Corporation. Susan has extensive experience in research, analysis and planning. At the New York Academy of Sciences, she created the first technology and public policy program, and then became Director of Strategic Planning and Special Projects. Prior to that, Susan was a project officer at the World Bank and a senior consultant to the U.S. Agency for International Development and to various private organizations including the Carnegie Corporation, specializing in healthcare and international economic research. She has led the formation of private foundations in Poland, Croatia, and Hungary and written business plans for foundations in India and Thailand. Under her leadership and during the political transition, Friends of Litewska Hospital became one of the first and most successful private philanthropies in Warsaw, Poland.

Julia Travers Rickert, Transforming Education

Transforming Education (TransformEd) advances research, policy, and practice to support PK-12 students in developing the mindsets, essential skills, and habits (MESH) they need to succeed in college, career, and life. MESH encompasses the subset of social-emotional skills that research has linked most clearly to student success and that, therefore, are of the most immediate importance to educators and education policymakers. TransformEd's work is grounded in compelling, longitudinal research on the importance of MESH competencies and informed by our on-the-ground experience as lead strategic advisors and partners to schools, districts, and programs across the country. Since 2013, TransformEd has pursued a strategy to make our own and others' MESH -related research actionable by bridging research, school practice, and education policy. In much of our work, TransformEd serves as a consultant to school systems, policymakers, and other non-profits on issues related to MESH research and practice. TransformEd is a fast-paced, collaborative, team- and growth-oriented organization that is committed to helping educators and education systems innovate in assessing and developing the mindsets, skills, and habits students need to succeed. Our team members are driven self-starters who thrive in an entrepreneurial environment and enjoy supporting and learning from one another. Follow our latest work through the TransformEd [website](#), [news digest](#), [twitter feed](#), and [blog](#).

John Schoenig, University of Notre Dame

John Schoenig is the Senior Director of Teacher Formation and Education Policy for the University of Notre Dame's Alliance for Catholic Education (ACE). In this role, he leads the ACE Teaching Fellows Program - the largest provider of Catholic school teaching talent in the United States - and its Program for Educational Access (PEA), an advocacy and leadership formation enterprise that helps develop and implement policy that expands financial access to faith-based schools. In addition, he serves as a faculty member and Fellow of Notre Dame's Institute for Educational Initiatives (IEI). From 1998 to 2000, he served as a Middle School English teacher at Holy Rosary School in Shreveport, Louisiana through ACE Teaching Fellows. He later served on the pastoral and administrative team for ACE and as the Director of Development for the Alliance for School Choice. He earned his BA and M.Ed from the University of Notre Dame and his JD from the Notre Dame Law School.

Alex Zequeira, Headmaster, St. John's High School, Shrewsbury, MA

Alex Zequeira was appointed the 18th Headmaster at Saint John's High School in Shrewsbury, Massachusetts in July of 2016. After graduating from the College of the Holy Cross in 1994 with a BA in history, Alex began his teaching career at Kingswood-Oxford School in West Hartford, CT, where he was a middle and upper school Spanish, drama, and journalism teacher, and served as the Assistant Director of Admissions, the 8th grade class dean, and coach for soccer, basketball, and baseball. In 2003, he was called from that position to serve as the founding principal of the Nativity School of Worcester, MA, where he also taught Spanish to grades 5 and 6. In

2004, he returned to his native Miami to his alma mater Belen Jesuit Preparatory School, where he served as a social studies teacher, a football, basketball, and track and field coach, and the Executive Director of the school's Alumni Association from 2005 to 2008. In 2008, Alex joined the Wooster School community in Danbury, CT as the Dean of Upper School, teaching Spanish, European and Latin American History, and coaching basketball and softball. In 2011, he rejoined the Nativity School of Worcester community as its 3rd President (Head of School). In May of 2016, Alex earned a M.Ed. in Educational Leadership from the Lynch School of Education at Boston College. Alex recently served as the chair of the Board of Directors of the national NativityMiguel Coalition of Schools, and currently serves on the Board of Advisors of the Latino Education Institute at Worcester State University, the Board of the United Way of Central Massachusetts, the Worcester Education Collaborative, and is a Corporator for the Greater Worcester Community Foundation, where he also serves as an advisor to the Nonprofit Support Center.