



The Larned A. Waterman Iowa Nonprofit Resource Center

Helping strengthen community organizations

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LAWINRC to Expand Services and Outreach

by Paul Thelen, LAWINRC Assistant Director

The mission of the LAWINRC is to strengthen the operational capacity of Iowa nonprofit organizations. Annually, we serve hundreds of nonprofit leaders through lectures and workshops delivered at venues across the state. We serve hundreds more through activities operated from our office in Iowa City.

We've listened to charities and foundations across Iowa who have expressed the increased need for one-on-one professional assistance, especially in the areas of leadership and management. In response, over the last twelve months we have tested our capacity to offer such services, and we evaluated the results of our performance.

We are excited to announce that we are formally launching several additional one-on-one services designed to assist board members and executive staff as they lead and manage their organizations. We are also opening an additional office in Des Moines. The Des Moines location will place us in greater proximity to thousands of central Iowa nonprofits. Further, Des Moines is a city many nonprofit leaders have occasion to visit throughout the year, and it serves as a central point of departure for when we commute to other areas of the state.

Brief descriptions of our expanded services and new location are below.

Our new strategic planning service is designed for organizations of all sizes who are either seeking to establish a plan for the first time or improve an existing plan. We guide organizations through the valuable process of reaffirming their mission, vision, and values. Likewise, we facilitate the process of aligning goals, objectives, and strategies. We emphasize that a plan is never truly complete, as future success requires measuring, assessing, and adjusting to an ever changing world. Further, purposefully improving your organization's planning abilities will yield benefits in other areas of the organization.

Our new services in leadership development and review are designed to assist your organization with the unique challenges nonprofit leaders face. We tailor our leadership development program to meet the needs of your organization. It is a program that can help improve the performance of executive staff members, as well as members of the board. As part of leadership development we facilitate staff and board

Des Moines Hours Begin in October

orientations, as well as offer leadership coaching—a service that can span several months or more. We find that coaching can be particularly helpful to new and emerging leaders, as well as those facing new challenges.

As part of our leadership review, we work with your organization to provide an assessment or evaluation of board members and/or executive staff. The goal of an assessment is to improve future performance. The goal of an evaluation is to gauge a completed performance. Each type of review can be valuable. The purpose of a review is to not only help identify strengths and weaknesses, but to provide meaningful feedback that helps improve organizational clarity and purpose as you work towards your mission.

There will be modest costs for organizations who apply for these services. Our objective is to deliver benefits that far exceed the cost. Further, we will continue to offer our existing services at little or no cost. We happily assist Iowans who are considering starting

a new nonprofit, and we provide instruction regarding the requirements of the Iowa Secretary of State and the Internal Revenue Service. We will continue to offer lectures and workshops on contemporary legal and management issues, and we will continue to produce our quarterly publications and add to our library of resource materials. We are continually finding ways to collaborate with partners or use technology to reduce expenses in service to the Iowa nonprofit community.

We will begin operating from Des Moines at the Iowa Center for Higher Education in early October. The office is located at 2500 Fleur Drive. In addition to office space, we will have access to classrooms and conference rooms to host events. We are excited to join several other University of Iowa programs in Des Moines, and we look forward to deepening our engagement in the capital city and surrounding communities. Our main office will remain in Iowa City. If you want to schedule an appointment at either office, you may contact us via telephone at 866-500-8980 or email at law-nonprofit@uiowa.edu.

Volunteer Iowa Receives Grant to Strengthen and Expand Iowa Initiatives

Volunteer Iowa recently received a Volunteer Generation Fund (VGF) grant of \$192,023 from the Corporation for National and Community Service (CNCS), the federal agency that oversees AmeriCorps and the nation's volunteer initiatives.

The funding will allow Volunteer Iowa to better support local organizations in recruiting, managing, and retaining volunteers to address some of Iowa's most pressing challenges.

The VGF grant is instrumental in supporting volunteer centers and cities in Iowa to connect citizens with opportunities to serve, increasing capacity of local organizations to engage volunteers in meaningful service, promoting volunteering, and developing local programming that leverages

volunteers to meet community needs, including disaster response.

The award will support a network of local Service Enterprise hubs, provide access to beginning and advanced level volunteer management training statewide, and will allow Volunteer Iowa to collaborate with local communities and emergency management

partners across the state to develop plans for managing disaster response volunteers. CNCS awarded 15 VGF grants to state service commissions across the country, totaling more than \$3.7 million.

For more about Volunteer Iowa see <https://volunteeriowa.org>



Southeast Iowa Summit Enters Third Year

by Paul Thelen, LAWINRC Assistant Director

“No grand idea was ever born in a conference,” begins one F. Scott Fitzgerald wisecrack, “but a lot of foolish ideas have died there.”

As the 2017 Southeast Iowa Nonprofit Summit approaches on September 21st, it is becoming increasingly clear that the grand idea here was the creation of the conference itself. And if its third year is like its previous two, attendance will reach maximum capacity as 250 nonprofit leaders from Iowa, Illinois, Missouri, and beyond assemble in Ottumwa.

The idea for the event started four years ago when the Ottumwa Regional Legacy Foundation was creating a new capacity building grant that would, in part, provide funds to assist people from local nonprofits who wanted to attend conferences being offered outside the area. During the course of the process, the Legacy Foundation began asking itself several simple questions: Is there a local need for a nonprofit conference? Could we have greater impact by educating multiple people within the same organization at the same time? Do we have the ability to produce such an event here?

The Legacy Foundation reached out to other organizations—including the United Way of Wapello County and ISU Extension and Outreach—and together they answered these questions with an affirmative, “Yes.” They later recruited TD&T CPAs and Advisors and the Wapello County Foundation as additional partners and began to plan their first conference.

The result of their efforts yielded several unique results: first, this was a major nonprofit conference in Iowa that wasn’t being held in Ames or Des Moines; second, there was no conference fee for attending



the event and lunch was also provided free of charge; third, and finally, the keynote speakers and presentations were focused exclusively on issues and topics relevant to the nonprofit sector in and around Iowa. The first year featured keynote speaker Jeffery G. Yost, President and CEO of the Nebraska Community Foundation, who focused on NCF’s theory of change, its skills building practices, and lessons learned in the field. Four one-hour breakout sessions featured nine topics including board governance, fundraising, marketing, strategic planning, and more. The breakout sessions were led by a diverse set of nine nonprofit professionals, educators, and consultants.

The response from attendees was overwhelmingly positive. “I didn’t know what to expect,” one reviewer wrote, “and I was totally thrilled by the quality of programming planned for the day and the choices in topics.” Another review offered praise and a request, “It was great to have a conference specific to non-profits and not have to drive to Ames! Please have this again. Don’t move any further north or west please!”

“One of my favorite comments I heard regarding the Southeast Iowa Nonprofit Summit was that they couldn’t believe that such a high-quality event was available so close to home,” said Kelly Genners, VP of Programs & Initiatives for the Legacy Foundation.

“They said they felt like they were attending a large conference in a metropolitan area! Those sentiments push our team to continue to raise the bar every year.”

The second-year event was similar to the first with a few modifications. The number of one-hour breakout sessions was reduced from four to three and a panel discussion was added. The keynote speaker was Melanie Lockwood, Executive Director of the Nonprofit Risk Management Center, who presented on the top ten risks facing nonprofits. A set of six speakers offered nine breakout sessions on donor development, conflict, diversity, rural nonprofit resources, social media, and more. The panel discussion was the final session of the day, and it featured four panelists who could speak from the perspective of funders—such as

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“...it brings individuals from small nonprofits together with those from larger foundations, all learning from one another.”

community foundations, federal agencies, and private foundations—and share their insight into the grant funding process.

“What we love most about the Summit is that it brings individuals from small nonprofits together with those from larger foundations, all learning from one another. What we wanted to instill most of all—and hoped that we were demonstrating ourselves by the pure collaborative nature of the event—is that we have much to learn from one another and by working together the end product can and will be better,” Genners said.

The Bridge View Center, which opened in 2007 along the banks of the Des Moines River in Ottumwa, hosted the event the first two years and will play host again in year three. The dynamic complex features a grand lobby, theatre, conference rooms, and Expo Hall that has served the needs of this event well.

This third year will again feature a roster of speakers with diverse nonprofit expertise and experience, including a keynote and plenary by the author of this article. Eight speakers will offer breakout sessions on a range of nonprofit topics (see column at right). New this year—based on feedback from last year’s review—is the implementation of a networking workshop. The expectation is that the event will again reach its maximum capacity.

“The test of a first-rate intelligence,” F. Scott Fitzgerald noted, “is the ability to hold two opposed ideas in mind at the same time and still retain the ability to function.” Nonprofit conferences like the Southeast Iowa Nonprofit Summit assist leaders and managers who must function in a sector that can be demanding, complicated, and paradoxical. Judy Vredenburg, a former executive of Big Brothers Big Sisters and the March of Dimes captures one paradox well, “Every time we in nonprofits satisfy customers, we drain resources, and every time for-profits satisfy a customer, they get resources.” That is what makes conferences like these so important.

The collaborators who produce this event plan to continue it into the foreseeable future. “As long as the need is there and our nonprofit organizations see

value in the event, we will continue to do our best to make it happen. Those of us that work with nonprofits every day are seeing the lessons learned implemented and the capacity improvement demonstrated,” said Genners. That is a grand idea, indeed.

You may register online for the Southeast Iowa Summit at <https://goo.gl/h2QuR5>. Registration is free. Space is limited.

Summit speakers:

- Deann Cook, Executive Director, United Ways of Iowa
- Courtney De Ronde, CPA, Assurance Principal, TD&T CPAs and Advisors
- Michelle Gnida, Dale Carnegie Master Trainer
- Drew Harden, President & Co-Founder, Blue Compass
- Tammy Rogers, Co-Founder, The Meyvn Group
- Ashley Shafer, CFP®, CAP®, 801 Group, Morgan Stanley
- Paul Thelen, JD, Assistant Director, Larned A. Waterman Iowa Nonprofit Resource Center, University of Iowa
- Stacy Van Gorp, Ph.D., Executive Director, R.J. McElroy Trust
- Jo Ellen Whitney, Davis Brown Law

Iowa Nonprofit Summit 2017 Comes to Altoona October 24-25

LAWINRC's Koontz and Thelen to Take Part in Legal Issues Roundtable

The 2017 Iowa Nonprofit Summit will take place October 24-25 at The Meadows Events & Conference Center in Altoona, Iowa.

The conference offers essential learning opportunities for Iowa nonprofit and volunteer management professionals and features outstanding keynote presentations, break-out sessions, networking opportunities, and exhibitors demonstrating the latest resources available to help nonprofits and volunteer programs excel. Another favorite aspect of the Summit is the Iowa Nonprofit Awards ceremony in which individuals and groups are recognized for outstanding service to their constituencies.



This year, keynote speakers are Rick Lynch and Michael McCann.

Rick Lynch, who delivers the October 24 keynote, is a Seattle-based management consultant and president of Lynch Associates. He is the author of several books, including *Lead! How public and nonprofit managers can bring out the best in themselves and their organizations*.

On October 25, Michael McCann delivers the keynote. He is the Lifestyles Director for Friendship Senior Options and has more than 20 years of experience providing leadership for nonprofits in all dimensions of wellness.

Richard Koontz, Director of the Larned A. Waterman Iowa Nonprofit Resource Center, and Paul Thelen, the center's Assistant Director, will participate in the roundtable discussion, Legal Issues for Nonprofits. (See information at right.)

An early registration conference discounts are available until October 3. Registration fees until this date are \$80 for one day or \$150 for both days. Ac-

commodations are available at Prairie Meadows hotel which is adjacent to the conference center.

To register and for details about breakout sessions, speakers, and workshop leaders, see <https://www.regonline.com/builder/site/default.aspx?EventID=1931676>

You can also stay on top of conference developments on Facebook at <https://www.facebook.com/iowanonprofitsummit/> or join the Volunteer Iowa listserv at <https://signup.e2ma.net/signup/1732801/1720872/?v=a>

Legal Issues for Nonprofits in 2017 Roundtable

Iowa nonprofit organizations can benefit by receiving timely, competent counsel on the legal matters that impact their missions. This roundtable features legal professionals in Iowa who are consistently working with nonprofit leaders on a range of legal matters. The speakers will briefly review legal issues associated with fiduciary duties of directors/officers, fundraising, bylaws, advocacy and lobbying, as well as highlight other significant legal developments that may have an impact upon the nonprofit sector. There will be time for a question and answer session.

Presenters:

- Willard L. Boyd III, Attorney, Nyemaster Goode
- Richard Koontz, Director, Larned A. Waterman Iowa Nonprofit Resource Center, University of Iowa
- Chip Lowe, Clinician in Residence, The Entrepreneurial/Transactional Clinic, Drake University School of Law
- Paul Thelen, Assistant Director, Larned A. Waterman Iowa Nonprofit Resource Center, University of Iowa

The New Bohemian Innovation Collaborative Seeks to Strengthen Nonprofits

The New Bohemia Innovation Collaborative (NewBoCo) is an organization dedicated to bringing opportunities and resources to eastern Iowa nonprofits. Based in Cedar Rapids, NewBoCo's offerings include education, training, coaching, and the benefit of community leaders' expertise. Nonprofits working with the group have the option of renting space in a co-working environment to share resources and interact with others in similar endeavors. Education and training features workshops in innovation and Agile methodologies. For additional information, see www.newbo.co/nonprofit-innovation/ or telephone 319-382-5128.

IRS Resources Help Donors Be Informed

The IRS has a 25-page publication for those who wish to form a charitable organization for the purpose of providing disaster relief. Publication 3833 *Disaster Relief: Providing Assistance Through Charitable Organizations* covers all aspects of creating such an organization. View or download the publication at <https://www.irs.gov/pub/irs-pdf/p3833.pdf>

A two-part mini course on disaster relief is also available on the IRS website. Topics cover such areas as tax rules that apply to charitable organizations in disaster situations, employer-sponsored disaster relief organizations, and tax treatment of relief recipients. They can be viewed at <https://www.stayexempt.irs.gov/home/depth-topics/depth-topics>

The agency also recommends the article *Beware of Fake Charity Scams Relating to Hurricane Harvey*. See it at <https://www.irs.gov/newsroom/beware-of-fake-charity-scams-relating-to-hurricane-harvey>

September 11, A Day of Service and Remembrance

September 11 as a National Day of Service and Remembrance was launched in 2002 by the nonprofit 9/11 Day and established the tradition of engaging in charitable service as a tribute to victims and responders to the 9/11 attacks. For information, see <https://www.nationalservice.gov/special-initiatives/days-service/september-11th-national-day-service-and-remembrance>

Training Opportunities

Lee County Extension: Nonprofit Management Academy

Marketing: Social Media and Digital Strategies

Date: September 13

Time: 9 am - 4 pm

Presenters: Sally Poole, CEO, Poole Communications

Location: Baymont Inn and Suites, 325 Main St., Keokuk

Cost: \$60; CEU add'l \$25.

Information/Registration/Special Needs

Contact: Alex Merk at 319-835-5116 or alexmerk@iastate.edu or Shelley Oltmans at 319-524-5055 or shelleyo@iastate.edu

Southeast Iowa Nonprofit Summit

One-day conference featuring breakout sessions, speakers, keynote, networking. Relevant to board members, staff, and volunteers.

Date: September 21

Time: 8 am - 4 pm

Location: Bridge View Center, 102 Church St., Ottumwa, IA

Cost: Free, but registration required as space is limited.

Registration: <https://goo.gl/h2QuR5>

Iowa Nonprofit Summit

Biennial two-day conference with breakout sessions, speakers, keynotes, networking and Iowa Nonprofit Awards ceremony.

Date: October 24-25

Location: The Meadows Events & Conference Center, 1 Prairie Meadows Dr., Altoona, IA.

Details: www.regonline.com/ianpsummit2017

Training Opportunities *(continued)*

Nonprofit Association of the Midlands

Registration details at www.nonprofitam.org. Choose *Learning* then *Training Calendar*.

HRAM September Program: Telling the World - Omaha Doesn't Coast!

Date: September 12

Time: 11 am - 4:30 pm

Keynote speaker David Brown, Greater Omaha Chamber of Commerce, 12 - 1 pm

Location: Scott Conference Center, 6450 Pine St., Omaha, NE

Contact: Erin Crouch at ecrouch@hram.org

12 Nonprofit Thank You Mistakes to Avoid

Date: September 13

Time: 2 pm

Location: Webinar

Presenter: Claire Axelrad, J.D., CFRE

Cost: Free

Rural Health Grants Webinar Series: Creating a Competitive Proposal

Session 5 of a webinar series to educate potential applicants about HRSA programs and resources, federal grant application process, and more.

Date: September 19

Time: 9:30 am

Location: Webinar **Cost:** Free

Contact: ROvercast@hrsa.gov or 816-426-5227

Guidelines & Principles for Nonprofit Excellence Workshop

Date: Sept. 19, Oct. 11, Dec. 6

Time: 9-11 am

Location: NAM, 11205 Wright Cir. #210, Omaha, NE

Cost: Free for NAM members; \$5 for future members

Contact: rosej@nonprofitam.org or 402-557-5800

Sep 26: How to Promote Your Online Fundraising Campaign

Date: September 26

Time: 12:00 pm

Location: Webinar **Cost:** Free

Presenter: Julia Campbell, digital marketing strategist

December Strategic HR Leadership Forum 2017: 2018 Hot Topics for the HR Professional

Date: December 8

Time: 8-9:30 am

Location: Security National Bank, 101st & Pacific Streets, Omaha, NE

Presenter: Stacie Engelman, SPHR, SHRM-SCP

Cost: \$35

2017 Nonprofit Summit of the Midlands

Keynote speaker Vu Le, Executive Director of Seattle nonprofit Rainier Valley Corps.

Date: November 1

Time: 8:30 am - 4 pm

Location: La Vista Conference Center, 12520 Westport Pkwy., La Vista, NE

Cost: \$150 for NAM members; \$225 for non-members; \$75 for lunch keynote and awards only.

Contact: Hannah at hannah@nonprofitam.org or 402-557-5800.

Firespring webinars (free)

Presenters: Jay Wilkinson and Dana Ostomel of Firespring

Social Media 101 for #GivingTuesday

Date: September 20

Time: 9:30 am

#GivingTuesday Before, During and After-Your 9-Week Success Plan!

Date: October 4

Time: 3:00 pm

How to Leverage Blogging & Thought Leadership for #Giving Tuesday

Date: October 10

Time: 9:30 am

Avoiding Donor Attrition after #Giving Tuesday

Date: October 20

Time: 1:30 pm

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Training Opportunities (from page 7)

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Community Foundation of Greater Des Moines

Register at <https://www.desmoinesfoundation.org/> Choose *News & Events* then *Calendar of Events*. Unless otherwise indicated, events are at Junior Achievement of Central Iowa, 6100 Grand Avenue, Des Moines, IA.

Board Launch – On Board: The Basics of Being an Effective Board Member

Date: September 18

Time: 3 - 5 pm

Cost: \$20

Board Launch–On Board: What You Need to Lead

Date: September 28

Time: 3 - 5 pm

Cost: \$20

Better Together Celebration

Recognition of Community Foundation supporters

Date: October 12

Time: 5:30 - 7 pm

Location: Mainframe Studios, 900 Keosauqua Way, Des Moines

Cost: Free

Board Launch – Fundraising & Fundraising: The Art of Making the Ask

Date: November 14

Time: 3 - 5 pm

Cost: \$30

About Our Organization

The Larned A. Waterman Iowa Nonprofit Resource Center is a University of Iowa interdisciplinary collaboration created to make more accessible educational and service programs focused on strengthening the operational capacity of Iowa nonprofit organizations.

The LAWINRC works collaboratively with government agencies, nonprofit organizations and educational institutions to impart new knowledge through activities and provide

Linn/Johnson Co. Extension: Nonprofit Management Academy

Courses lead to a certificate in nonprofit management and meet 9 am - 4 pm at ISU Extension & Outreach, 383 Collins Rd., Ste 201, Cedar Rapids. Cost per course \$75; CEUs an additional \$25. Register at <http://www.extension.iastate.edu/registration/events/conferences/nonprofit/> Contact Shelley O'Neal at 319-377-9839 or via email at soneal@iastate.edu with questions.

Non-Profit Board Engagement

Date: September 21

Presenter: Leslie Wright, United Way of East Central Iowa

Limit: 40

Four Steps to Effective Program Evaluation

Date: October 19

Presenters: Nancy Franz, Professor Emeritus, Iowa State University

Limit: 40

Change Management: If You're Not Changing, You're Dying

Date: November 3

Presenter: Dr. Deb Oliver, Iowa Quality Center

Limit: 40

Grant Writing Workshop

Date: November 16

Presenter: Lance Noe, Director, Center for Professional Studies, Drake University

Limit: 30

information and training resources to help nonprofit organizations and interested persons throughout Iowa. We seek to build the capacity and develop the effectiveness of community-based organizations and enhance the overall effectiveness of local organizations in building communities.

The LAWINRC also introduces students to the nonprofit sector and develops their sense of public and community service.