

OC  
2.0

Are you  
ready to  
upgrade?

**4th Annual Summit  
for Nonprofit Leaders**

Newport Beach Marriott  
May 22nd, 2014  
May 23rd, 2014

Presented by:



**Orange County  
Funders Roundtable**  
Local Funders, Regional Impact.

# Conference at a Glance

## Day

1

- May 22nd, 1:00 PM - 6:30 PM

12:00 – 1:00 PM	Arrival and Registration
1:00 – 1:30 PM	Welcome and Overview
1:45 – 3:15 PM	Breakout Session A
3:30 – 5:00 PM	Breakout Session B
5:00 – 6:30 PM	OC Funders Roundtable Summit Reception

## Day

2

- May 23rd, 7:30 AM - 2:00 PM

7:30 – 8:30 AM	Breakfast with Funders
8:30 – 10:00 AM	Breakout Session C
10:15 – 12:00 PM	Breakout Session D
12:00 – 2:00 PM	Lunch and Keynote Address
2:00 PM	Adjourn

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## Thank you to our Summit sponsors!

Bank of America  
Change A Life Foundation  
Children & Families Commission  
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Disneyland Resort  
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Fieldstone Foundation  
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JPMorgan Chase Foundation  
Kay Family Foundation  
Marisa Foundation  
Orange County United Way  
Opus Community Foundation  
Orange County Community Foundation  
Pacific Life Foundation  
PIMCO Foundation  
Samueli Foundation  
Sisters of St. Joseph Healthcare Foundation  
St. Joseph Health Systems Foundation  
The Allergan Foundation  
The Boeing Company  
The California Endowment  
Ueberroth Family Foundation  
Union Bank Foundation  
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Weingart Foundation  
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Event planning services provided by



# Welcome

Welcome to the 4th Summit for Nonprofit Leaders! It is a pleasure to bring together nonprofit executives, industry thought leaders, and board members from across Orange County who work so diligently to serve our communities.

On behalf of the members and the Summit Advisory Board, thank you for being part of the conference. Your participation helps the Roundtable achieve its mission of promoting effective philanthropy and strengthening the Orange County nonprofit community.

This year's theme, "Orange County 2.0: Are You Ready to Upgrade," speaks to the emerging energy around transforming the way we as nonprofit professionals conduct our business, scale our programs, and leverage community resources and partners. Six years after the official announcement of the nation's recession, strong regional nonprofit organizations are grappling with sustaining transformational growth and change to address the most pressing needs of Orange County. It's an innovative time in the industry, as leaders everywhere are envisioning a stronger, dynamic, growing sector.

The speakers joining us this year are on the frontline of this movement. Our presenters come from well-known consulting firms, universities, and foundations. Our panels are filled with seasoned nonprofit executives and board members willing to share their experiences and challenges from their own organizational journey. The Advisory Board has worked hard to develop engaging content that allows for dynamic interaction to make the most of this expertise and this collective conversation.

Orange County United Way is once again proud to join the following sponsors who made this year's conference possible: The Allergan Foundation, Bank of America, The Boeing Company, The California Endowment, Change a Life Foundation, Children and Families Commission of Orange County, JPMorgan Chase Foundation, Irvine Health Foundation, Marisla Foundation, Opus Community Foundation, Pacific Life Foundation, Orange County Community Foundation, PIMCO Foundation, Samueli Foundation, St. Joseph Health System Foundation, Weingart Foundation, and Wells Fargo.

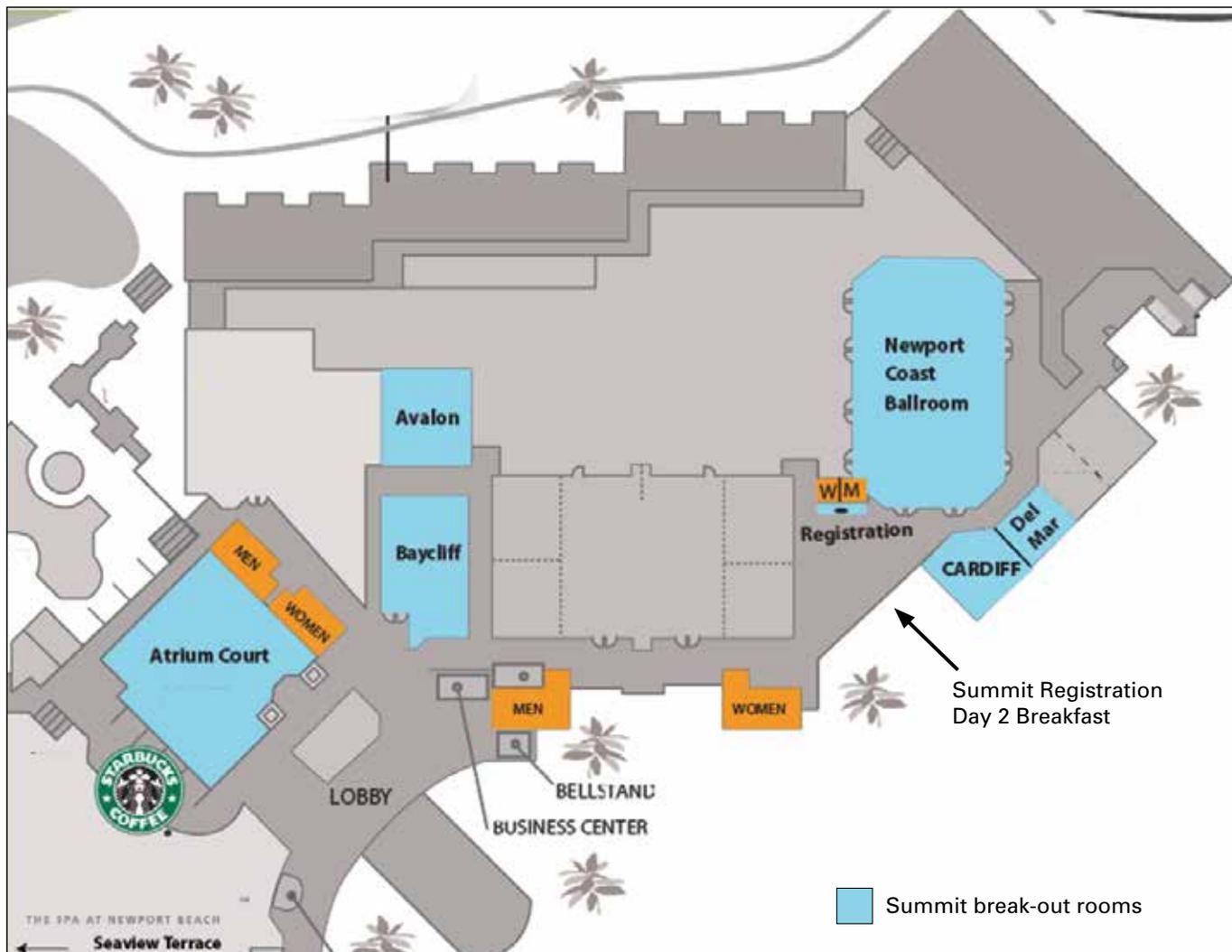
On behalf of the Orange County Funders Roundtable, thanks again for attending this year's forum. We welcome and anticipate your enthusiasm and thoughtful participation and hope that you will take away some tips and actionable ideas that will make both an immediate and long term impact on your organization and our community as a whole.



Max L. Gardner  
Chair, Orange County Funders Roundtable  
President and CEO, Orange County United Way

# Conference Details

## Conference Location



**Conference Materials and Name Tags** – If you are attending both days of the Summit, **please remember to bring your name tag and Summit materials on Day 2.** There is a limited supply of materials, and we are trying to be eco-friendly. After the Summit, all available materials and PowerPoint presentations will be posted online at [www.ocfunders.org](http://www.ocfunders.org).

**Meals** – Breakfast and lunch will be served on Day 2 (5/23). If you have requested a vegetarian meal, please present your meal ticket (which you will find inside your name badge) to your server at the lunch.

**Wine Reception** – Please join us at the end of Day 1 (5/22) to relax and enjoy complimentary wine and appetizers at the outside Seaview Terrace.

# Planning

## Participants

**Special thanks to the planning participants who helped shape the focus and content of the Summit.**

**Armando de la Libertad**, Delhi Center  
**Barry Ross**, Healthy Communities  
**Barbara Nelson**, Mary's Shelter  
**Brenda Rodriguez**, Affordable Housing Clearinghouse  
**Cathy Paredes**, Bank of America  
**Cathy Seelig**, Friendly Center  
**Colleen Mensel**, El Viento Foundation  
**Connie Jones**, Smeda/Southwest Community Center  
**Dan McQuaid**, One OC  
**Dana Butler-Moburg**, J.F. Shea Therapeutic Riding Center  
**Dave Peters, II**, Hands Together  
**Dawn Reese**, The Wooden Floor  
**Debbie Groendal**, CVOC  
**Elizabeth Bear**, Healthy Smiles for Kids of OC  
**Elizabeth Pearson**, Pacific Chorale  
**Holly Hagler**, Senior Serv  
**Jason Lacsamana**, OC Asian & Pacific Islander Community  
**Jean Wegener**, Serving People in Need  
**John Forsythe**, Pacific Symphony  
**John Scola**, MUZEO  
**Julia Foster**, Irvine Barclay Theatre  
**Kathy Tillotson**, Build Futures  
**Lara Fisher**, South County Outreach  
**Linda Smith**, Providence Speech & Hearing Center  
**Lisa Ackerman**, TACA  
**Lisa Wolter**, OC Affiliate of Susan G. Komen for the Cure  
**Lucy Santana**, Girls Inc of OC  
**Mallory Vega**, Acacia Adult Day Services  
**Maria Mazzenga Avellaneda**, Pathways of Hope  
**Maricela Rios**, Human Options  
**Mary Gray Perdue**, Family Assistance Ministries  
**Michele Silva**, MOMS Orange County  
**Pamela Pimentel**, MOMS Orange County  
**Robin Sinclair**, Casa Youth Shelter  
**Scott Trotter**, Child Abuse Prevention Center  
**Shari Battle**, Bank of America  
**Sharon Ellis**, Habitat for Humanity of OC  
**Susan Reeder**, South Coast Repertory  
**Tim Strauch**, OneOC  
**Zoot Velasco**, Muckenthaler Cultural Center

## Thank you to our 2014 Summit Advisory Board

**Iosefa Alofaituli**, *Executive Director*,  
Oak View Renewal Partnership

**Sharon Battle**, *Senior Vice President*,  
*Market Manager – Orange County*,  
Bank of America

**Lisa Fujimoto**, *Executive Vice President*,  
Change a Life Foundation

**Max Gardner**, *President and CEO*,  
Orange County United Way

**Shelley Hoss**, *President*,  
Orange County Community Foundation

**Scott Larson**, *Executive Director*,  
HomeAid Orange County

**Anne Olin**, *Executive Administrator*,  
OC Funders Roundtable

**Shawna Smith**, *Executive Director/CEO*,  
Taller San Jose

**Rick Stein**, *Executive Director*, Arts OC

**Nicole Suydam**, *CEO*, Second Harvest  
Food Bank of Orange County

# What is the

## Orange County Funders Roundtable?

The Orange County Funders Roundtable (OCFR) is a funder collaborative committed to promoting **effective** philanthropy and **strengthening** the nonprofit sector in Orange County.

Since 2006, the OCFR has promoted information sharing and collaborative funding projects among regional funders and sponsored community needs assessments to better gauge the issues facing local nonprofits. Through discussion and debate, OCFR members identify current issues facing the community and challenges facing the nonprofit sector. Past areas of focus have included technical assistance, capacity building, homelessness, job development, census, loan funds, and financial resources.

The OCFR is not itself a grant-making organization and does not have a grant application or funding cycle. However, OCFR members occasionally pool their funds to build nonprofit capacity or to support regional initiatives, such as its Summit for Nonprofit Leaders.

The OCFR welcomes a wide variety of institutional philanthropists dedicated to supporting Orange County's community needs. Members benefit from peer education and networking, as well as opportunities to engage in collaborative projects and funder-nonprofit dialogue.

For more information on the OCFR, visit our website at [www.ocfunders.org](http://www.ocfunders.org).

### OCFR Members

**The Allergan Foundation**

**The Boeing Company**

**Bank of America**

**The California Endowment**

**Capital Group**

**Change a Life Foundation**

**Children and Families Commission  
of Orange County**

**Disneyland Resort**

**Edwards Lifesciences Fund**

**Fieldstone Foundation**

**Fluor Foundation**

**Irvine Health Foundation**

**JPMorgan Chase Foundation**

**Kay Family Foundation**

**Marisla Foundation**

**Opus Community Foundation**

**Orange County Community Foundation**

**Orange County United Way**

**Pacific Life Foundation**

**PIMCO Foundation**

**Samueli Foundation**

**Sisters of St. Joseph Healthcare Foundation**

**St. Joseph Health Systems Foundation**

**Ueberroth Family Foundation**

**Union Bank Foundation**

**WD Foundation**

**Weingart Foundation**

**Wells Fargo**

# Day One Thursday, May 22

1:00 pm - 1:30 pm **Summit Welcome and Overview**  
**Max Gardner**, President and CEO,  
Orange County United Way; Chair,  
Orange County Funders Roundtable

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1:30 pm - 1:45 pm **Break**

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1:45 pm - 3:15 pm **Break-Out Session**  
**What Every Nonprofit Needs to Know  
about the Emerging Outcomes-based  
Funding Environment**  
**Jessica LaBarbera**, Director, Strategic  
Innovation, Nonprofit Finance Fund  
**Shari Battle** (Moderator), Senior Vice  
President, Bank of America

This session examines both the macro-level trends impacting the sector and the adaptive capacities every nonprofit needs to respond to an outcomes driven environment. Topics include building financial management practices, creating a performance management culture, investing human resources, collaboration and capitalization planning. Participants will receive an action planning template to guide their thinking and action beyond the session.

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**Break-Out Session**  
**Why “Why” Matters: The Benefits  
of Developing a Clear Statement  
for Being**  
**Rebecca Alvarez**, Principal, NP Strategies  
**Jennifer Tankersley**, Principal, NP Strategies  
**Ed Kacic** (Moderator), President, Irvine Health  
Foundation

Organizations are often so focused on perfecting the delivery of their mission, through program strategies and operational improvements, that they can lose touch with “why” they are doing so in the first place. In this interactive session, NP Strategies will share stories of transformation and questions you can take back to your organization to test your collective sense of “why”.

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**Break-Out Session**  
**Bold Risk, Big Change**  
**Dawn S. Reese**, Executive Director,  
The Wooden Floor  
**Frank Talarico**, President and CEO,  
Goodwill Industries  
**Randy Barth**, Founder and CEO, THINK Together  
**Margie Wakeham**, Executive Director,  
Families Forward  
**Scott Larson** (Moderator), Executive  
Director, HomeAid

What does it take to grow your impact? This dynamic panel of nonprofit executives from Goodwill Industries, THINK Together, The Wooden Floor and Families Forward will share personal journeys, lessons learned, and even their failures as they worked to scale their impact throughout the region and beyond.

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**Break-Out Session**  
**Collective Impact: Lifting the Veil**  
**Carla Vargas**, Senior Vice President, Community  
Impact, Orange County United Way  
**Jill Bolton**, Director, Community Relations,  
Disneyland Resort  
**Karen Williams**, President and CEO, 2-1-1 OC  
**Scott Trotter**, Executive Director,  
Child Abuse Prevention Center  
**Christina Altmayer** (Moderator), Executive Director,  
Children and Families Commission of Orange County

Collective Impact is mentioned everywhere... But what, exactly, does it mean? This session is designed to grapple with this compelling industry vision, and will offer candid discussion around the concept of collaboration and shared outcomes, and how it is being currently manifest in Orange County.

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3:15 pm - 3:30 pm

**Break**

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3:30 pm - 5:00 pm

**Break-Out Session**

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**Jessica LaBarbera**, Director, Strategic Innovation, Nonprofit Finance Fund

**Shari Battle** (Moderator), senior Vice President, Market Manager – Orange County, Bank of America

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**Break-Out Session**

**Models of Innovative Partnership**

**Holly Hagler**, President and CEO, Senior Serv

**Geoff R. Le Plastrier**, Board Member, Seneca OC

**Bill Ford**, Senior Vice President, Senior Client Manager, Specialized Industries-West, Bank of America Merrill Lynch, Bank of America N.A., Merrill Lynch, Pierce, Fenner & Smith Incorporated

**Max Gardner** (Moderator), President and CEO, Orange County United Way; Chair, Orange County Funders Roundtable

There is a dynamic continuum of strategies to foster collaboration and growth, from loose agreements to formal mergers. Join this panel of leaders who have made the most of innovative partnerships as they seek to grow their ability to serve the community.

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**Break-Out Session**

**Let’s Get Real: Fostering Dialogue between Nonprofits and Funders on Innovation**

**Fred Ali**, President and CEO, Weingart Foundation

**Shelley Hoss** (Moderator), President, Orange County Community Foundation

Join Fred Ali, President of the Weingart Foundation for an interactive discussion on the conditions necessary for innovation and how to engage funders in scaling programs and growing impact.

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5:00 pm - 6:30 pm

**Summit Reception (Outdoor Terrace)**

Hosted by the **Orange County Funders Roundtable**

7:30 am - 8:30 am

**Breakfast**

Come enjoy a casual buffet-style breakfast with your colleagues and local funders.

8:30 am - 10:00 am

**Break-Out Session**

**Developing Leaders/Surviving Succession**

**Nicole Suydam**, CEO, Second Harvest Food Bank  
**Sister Eileen McNeerney**, Assistant General Superior, Sisters of St. Joseph of Orange, Founder, President Emeritus, Taller San Jose  
**Paula Tomei**, Managing Director, South Coast Repertory  
**Shawna Smith** (Moderator), CEO, Taller San Jose

Succession isn't a singular event; it is an orientation and long-term process that when done well, readies organizations for dynamic growth. This panel of nonprofit leaders will share true stories of "succession survival" and practical tips about how to prepare for this leadership change.

**Break-Out Session**

**Defining Your Destination**

**Jennifer Li Shen**, Partner and Co-Founder, Blue Garnet  
**Way-Ting Chen**, Partner and Co-Founder, Blue Garnet

You wouldn't jump in your car and drive without knowing where you need to go...would you? So, why do it with your organization? Take a thought provoking and energizing trip with Blue Garnet, as they make the case, offer a practical tool, and share stories of starting with the end in mind.

**Break-Out Session**

**How to Build a Sustainable Culture of Creativity**

**Lynda Lawrence**, Chief Idea Officer at Ideaworks Consulting, Faculty, UCI Merage School of Business  
**Jack Toan** (Moderator), Regional Vice President, Wells Fargo

In a hands-on workshop, Lynda Lawrence will guide you through the essential steps, the barriers and how to overcome them, and ways to keep that culture alive and well. Drawing on her decades of experience with corporations, government agencies, and nonprofits, she'll share success stories—and failures—as you take the first step toward building your own culture of creativity.

10:00 am - 10:15 am

**Break**

10:15 am - 12:00 pm

**Break-Out Session**

**Developing an Engaged and Effective Board of Directors**

**Vicki Booth**, President, Ueberroth Family Foundation, Board Chair, Orange County  
**Tom Rogers**, Chairman, Plaza Bank; Former United Way Board Member  
**Michelle Jordan**, Principal, Jordan LLC, Strategic Communications; Board Member, 2-1-1 OC; Former Chair, OneOC  
**Max Gardner** (Moderator), President and CEO, Orange County United Way; Chair, Orange County Funders Roundtable

The title says it all. No questions are off limits in this open conversation designed for board members. Join a diverse panel of current board members as they take on many of the challenges of the boardroom.

## Break-Out Session

### **The CEO Playbook: How to Avert Disaster and Strengthen Your Organization through Savvy HR Practices**

**Edson McClellan** (Speaker), Partner, Rutan & Tucker

**Pamela Pimentel**, RN, Chief Executive Officer, MOMS Orange County

**Gene Howard**, Director, Orange County Alliance for Children and Families

**Dana Butler-Moburg**, Executive Director, The Shea Center for Therapeutic Riding

**Shelley Hoss** (Moderator), President, Orange County Community Foundation

The workplace is changing; the workforce is complex, and HR laws are hard to keep up with – especially for nonprofits without the benefit of corporate HR departments. This seminar will offer critical guidance on some of the most common HR challenges facing nonprofit employers, and provide some candid case studies to make it real.

## Break-Out Session

### **Social Enterprise: Myths and Realities**

**Jerri Rosen**, CEO and Founder, Working Wardrobes

**Diane Helfrey**, Executive Director and Founder Social Venture Partners

**LaMecia Butler**, Portfolio Manager, REDF

**Josefa Alofaituli** (Moderator), Executive Director, Oak View Renewal Partnership

It's been called the "holy grail" of sustainability by some; completely "unattainable" by others. This session helps set the stage for honest dialogue about revenue generating strategies, the role of social innovation in nonprofit sustainability, and when these innovative strategies are right for your organization.

12:00 pm - 2:00 pm

## **Closing Plenary Luncheon**

Hosted by the **Orange County Funders Roundtable**

### **Special Presentation**

#### ***The Sister Regina Fox Inaugural Quiet Achiever Award***

**Max Gardner**, (Host), President and CEO, Orange County United Way; Chair, Orange

**Lisa Fujimoto**, (Presenter), Executive Vice President, Change A Life Foundation

### **A New Golden Age of Philanthropy?**

**James M. Ferris**, (Speaker), Director, The Center on Philanthropy and Public Policy Emery Evans Olson Chair in Nonprofit Entrepreneurship and Public Policy

Sol Price School of Public Policy University of Southern California

**Fred Ali** (Panelist), President and CEO, Weingart Foundation

**Michael Ruane** (Moderator), Chief of Strategy and Public Affairs, CalOptima

2:00 pm

Summit Ends

# Speaker Biographies



## **Fred Ali, President and CEO, Weingart Foundation**

Fred Ali is the President and Chief Executive Officer of the Weingart Foundation, a private foundation that supports nonprofit organizations in more effectively addressing the needs of low-income and underserved individuals and communities in Southern California. Prior to his appointment to the Foundation in 1999, Fred held senior leadership positions with non-profit organizations, educational institutions, and government agencies. Fred currently chairs the Board of Advisors for the Center on Philanthropy and Public Policy at the Price School of Public Policy, University of Southern California. He sits on the boards of the California Association of Nonprofits, the Child Welfare Initiative, and Grantmakers for Effective Organizations. Fred also serves as a Senior Fellow at the UCLA Luskin School of Public Affairs. He is a frequent speaker on issues and trends affecting nonprofit and philanthropic organizations.



## **Iosefa Alofaituli, Executive Director, Oak View Renewal Partnership**

Iosefa leads Oak View Renewal Partnership's strategic planning, operations and fund development. Iosefa coordinates grassroots collaborations between residents, public sector and business stakeholders. Such efforts have created sustainable change including a workforce initiative, micro-enterprise incubator, mobile health clinics, youth soccer league, monthly community cleanup and community gardens. Prior to OVRP, Iosefa was a Peace Corps volunteer for over two years in the Dominican Republic. Serving as an Economic Development Advisor to a fishing village, he led the creation of an artisan school, micro-enterprises, business development course, travel clinic, and health workshops. Through this experience, Iosefa gained Spanish fluency. Preceding his community development work, Iosefa spent five years in the healthcare industry in sales and accounts management roles. He grew up in Southern California before graduating from the University of Pennsylvania.



## **Christina Altmayer, Executive Director, Children and Families Commission of Orange County**

Christina Altmayer was recently appointed as the Executive Director of the Children and Families Commission of Orange County after serving about six months as the Interim Executive Director. Christina had previously served as a consultant to the Commission since its inception and was the program director for its pediatric health investments. Prior to accepting the position, Christina was the President of Altmayer Consulting, Inc. and specialized in management consulting to public and nonprofit agencies. She has worked extensively with government agencies at the state, county and municipal level on strategic planning, performance management and innovating program design. In her consulting practice she worked with numerous Children and Families/First 5 Commissions throughout California on long term financial planning, strategy development, program design and implementation, and evaluation.



### **Rebecca Alvarez, Principal, NP Strategies**

As co-founder of NP Strategies, Rebecca Alvarez is committed to combining her business and nonprofit experience to help nonprofits reach higher levels of performance and impact. Prior to forming NP Strategies, Rebecca was the Manager of Consulting at Bainbridge, Inc. Since forming NP Strategies, Rebecca has consulted with clients on a range of issues including sustainability, business planning and strategy, market research, leadership development and organizational change. Her clients have encompassed nearly all facets of the nonprofit sector including community development, arts, education, scientific research, youth development and economic development. Rebecca earned a Master in

International Management from the University of California, San Diego's Graduate School of International Relations & Pacific Studies and a Bachelor of Arts in International Relations and Spanish (with minors in Economics and Latin American Studies) from the University of Delaware. She lives in San Clemente with her husband and two children.



### **Randy Barth, Founder and CEO, THINK Together**

Randy Barth is recognized as one of the nation's leading social entrepreneurs. A successful investment advisor for various Wall Street firms and private company CEO, he founded THINK Together as a volunteer in 1997 and served as the organization's Board Chair. Upon the sale of his company in 2003, Barth became THINK's full-time CEO. Since then he led the development of a successful plan to scale the organization growing from an organization serving 2,000 students on \$1.5 million in revenue to serving more than 100,000 students currently on more than \$60 million in annual revenue. Along the way he has built a deep management team and a strong results-oriented culture. In addition,

THINK Together has created 2,600 jobs over the last five years. Barth has earned numerous awards for civic and business leadership including Concordia University Irvine's Servant Leadership Award in 2011. He currently chairs the Board of Directors of the Santa Ana Chamber of Commerce and serves on the leadership of the California Afterschool Network. Barth holds a bachelor's degree in economics from UCLA and studied under Peter Drucker at the Graduate School of Management at Claremont Graduate University.



### **Shari Battle, Senior Vice President, Orange County Market Manager Global Marketing & Corporate Affairs, Bank of America**

Shari Battle is the Corporate Social Responsibility Market Manager for Bank of America in Orange County. As Market Manager she is responsible for championing the company's corporate social responsibility, driving brand favorability and organic revenue growth in Orange County. In a career with Bank of America that spans 25 years, Shari has held leadership roles in a number of businesses; retail banking, leadership development, marketing and corporate social responsibility. In her current capacity, Shari works with local executives to deliver the bank's brand across Orange County. She is responsible for

strategic local delivery of the bank's corporate social responsibility commitment, charitable giving, sponsorship activities, media relations, government relations and associate engagement. In addition, Shari also served as the executive sponsor for Bank of America's Orange County LEAD for Women. Shari is active in the community where she serves on the Orange County Business Council board of directors where she chairs the workforce housing committee, the Orange County Funder's Roundtable, and is a board member of the Aliso Viejo Middle School PTSA. Shari graduated from the University of California, Los Angeles where she majored in economics. As an Orange County native, Shari and her husband, Lawrence, reside in Laguna Niguel with their two daughters.

# Speaker Biographies



## **Jill Bolton, Director of Community Relations and Global Ambassador Program, Disneyland Resort**

Jill joined the Public Affairs Division as Manager of Disney Educational Programs in February 1994 and helped Disneyland establish a strong relationship with the Orange County Department of Education and the California State Department of Education. In 1998, Jill's responsibilities were expanded to encompass all of the Disneyland Resort Community Relations' efforts, where she oversees all donations to our community, and a variety of outreach programs, including the Disney Wish Program, The Disneyland Resort Scholarship Program, Disney VoluntEARS, which in 2013 celebrated its 30th Anniversary, and several countywide events including the annual CHOC Walk. Jill is also responsible for the Global Ambassador Program which began 50 years ago at the Disneyland Resort. Jill was promoted to Director of Community Relations in 2000 and in February 2008 she was given additional responsibilities for the Ambassador Program on a global level. She currently serves on numerous community boards, including Anaheim MUZEO, GOALS, Festival of Children Foundation and is Chairman of the board of Anaheim Family YMCA. She is an active member of the Assistance League Anaheim and serves on the Aids Services Foundation Advisory board. Jill is a former president of the Orange County Community Relations Council and previously served on the boards of Pacific Symphony, CHOC Foundation for Children, UCI Claire Trevor School of Fine Arts Dean's Advisory Council, Project Tomorrow, Vital Link Orange County, and the National Conference for Community and Justice. Jill earned her B.S. in Psychology and an Education Administrative Credential from the University of California, Irvine, and her Masters Degree in Counseling and a School Psychology Credential from Long Beach State University. Prior to joining Disneyland, Jill was employed as a full-time School Psychologist in Orange County, California.



## **Vicki Booth, President, Ueberroth Family Foundation, Board Chair, Orange County Community Foundation**

Vicki U. Booth is the President of the Ueberroth Family Foundation. In this capacity she works with dozens of non-profit organizations county wide. She is a Founding Trustee of Sage Hill School, an independent, non-denominational High School and is a former Chair of the Board of Trustees. Vicki serves as Vice-Chair on the board of Governors of the Orange County Community Foundation where she also Co-Chairs the Fund Distribution Committee. Booth is a member of Circle 1000, a fundraising group for Hoag Hospital's Cancer Center, and served as Chairman for 4 years. She has served as a volunteer for many years at both Sage Hill School, and Harbor Day School, where she was Parent Council President. Vicki received her Bachelor's degree from the University of Colorado. She and her husband Bill have three children.



## **Dana Butler-Moburg, Executive Director, The Shea Center for Therapeutic Riding**

Dana Butler-Moburg has her dream job. An avid equestrian and career nonprofit executive, she has served as executive director for The J.F. Shea Therapeutic Riding Center in San Juan Capistrano for nearly 17 years. Since 1997, The Shea Center has grown from a \$335,000 per year organization to an annual budget of \$2.6 million. In 2013, more than 820 people were served by Shea Center programs which rely heavily on more than 750 community volunteers. With 15 full-time staff, 8 part-time staff, various contract positions and 20 horses, The Shea Center is one of the largest therapeutic equestrian centers in the country. Under the leadership of Butler-Moburg, the Shea Center embarked on a \$13 million major renovation project in 2005. The \$4.5 million Equestrian phase of the construction

project was completed in early 2007 and the final \$3.5 Klein Education, Family and Client Center and site completion was in November, 2009. Butler-Moburg has a 25-year background in nonprofit management and administration giving her experience in all areas of the nonprofit organization. Prior to The Shea Center, she spent seven years with the American Heart Association in Los Angeles receiving two national awards for her work in communications and marketing. For Butler-Moburg, a fourth level dressage rider, joining the Shea Center is the perfect combination of a personal love of horses and a professional desire to provide meaningful services to the community. She has a passion for forwarding philanthropy and making sure people with special needs have access to quality therapeutic equestrian programs. Several years ago, she started a therapeutic riding administrator networking group that now has over 600 members from nonprofit therapeutic riding centers throughout the U.S. She also has taught and consulted as a volunteer for more than 80 centers. Born and raised in the Pacific Northwest, Butler-Moburg graduated from the University of Washington in 1988 and later made Southern California her permanent home. She resides in Orange with her husband Frank and two well-loved and mostly spoiled cats.



### **LaMecia Butler, Portfolio Manager, Roberts Enterprise Development Fund (REDF)**

LaMecia Butler is the Portfolio Manager at Roberts Enterprise Development Fund (REDF), a nonprofit intermediary that provides funding and technical assistance to the employment social enterprises which hire individuals with barriers to employment. Her work includes acting as a business mentor and providing hands-on strategic technical assistance to REDF's portfolio of social enterprises in Northern and Southern California. She supports REDF's portfolio management efforts, conducts due diligence, and contributes to REDF's overall strategic development. In addition, LaMecia works on REDF's field building and knowledge development by developing and executing the strategy for the national employment social enterprise group, SE4Jobs. Prior to joining REDF, LaMecia earned an MBA from Rice University and graduated magna cum laude from the University of Texas at San Antonio. Before business school and after receiving her Bachelor's degree, she worked for lifestyle media company Scripps Networks for four years before starting a public relations firm that served nonprofits in the Greater Houston area. She currently resides in Houston, TX.



### **Way-Ting Chen, Partner and Co-Founder, Blue Garnet**

Way-Ting Chen has a passion for problem solving and generating breakthrough insights that lead to social impact. She bridges her knowledge and experiences across the social, commercial and public sectors to anticipate and identify strategic challenges, understand their fundamental causes and devise effective and practical solutions for her clients. Way-Ting has over 12 years of strategy and management consulting experience working with nonprofit organizations and corporate clients on addressing issues related to outcomes, impact and performance. She is also a frequent speaker for national and regional audiences (e.g., Social Enterprise Alliance, Alliance for Nonprofit Management, California Association of Nonprofits), on topics related to impact, strategic business planning and management. Prior to founding Blue Garnet in 2002, she served as engagement manager at Booz Allen Hamilton (now Booz & Company) in New York, where she led projects involving business strategy and organizational design and transformation for Fortune 500 clients. Way-Ting is a Founding Partner and Board member of Los Angeles Social Venture Partners (LASVP). She recently served as Vice-Chair of the California Association of Nonprofits (CAN), sits on the advisory boards of Pacific Asian Counseling Services and Coro Executive Fellowship Program, and membership committee of Alliance for Nonprofit Management. Way-Ting holds an International MBA from the University of Chicago Booth School of Business and a BA with honors in Economics and Political Science from Swarthmore College. She lives with her family in Playa del Rey, CA.

# Speaker Biographies



## **James M. Ferris, Director, The Center on Philanthropy and Public Policy**

James M. Ferris is the founding Director of The Center on Philanthropy and Public Policy at the University of Southern California. He is also a Professor in the Sol Price School of Public Policy and holds the Emery Evans Olson Chair in Nonprofit Entrepreneurship and Public Policy. He specializes in the economics of the public and nonprofit sectors, public finance and public policy, and recently spearheaded the development of the new Master's degree in Nonprofit Leadership and Management at the Price School. Dr. Ferris' research focuses on the shifting roles of the public, nonprofit and for-profit sectors in governance and the economy. He is currently investigating the changing landscape of philanthropy; roles and strategies for foundation engagement in public policymaking; the efficiency of philanthropic markets; philanthropic-government partnerships; and place-based philanthropy. Dr. Ferris serves as a member of the Nonprofit Policy Forum editorial board, and was recently appointed to the National Park Service Philanthropy and Partnerships Committee as well as the Independent Sector's Programs and Practice Committee. Dr. Ferris was inducted as a Fellow into the National Academy of Public Administration in 2013. Dr. Ferris previously served as Vice Dean (1995-97) and as the founding Director of the Program in Public Policy (1989-93) at USC where he was responsible for initiating, building and developing the Master in Public Policy degree program. He teaches courses in public policy, philanthropy and nonprofits, public finance, and political economy of institutions at both the undergraduate and graduate levels.



## **Lisa Fujimoto, Executive Vice President, Change A Life Foundation**

Lisa Fujimoto has been a recognized Executive Director in the philanthropic sector for 14 years with experience, and proven track record in the corporate affairs/community relations, private foundations, nonprofit fundraising experience, in local, national, and international corporations and agencies. She is an accomplished leader and manager able to influence key stakeholders in achieving objectives and building teams in the accomplishment of the organization's goals and objectives. She is a strong professional with outstanding ability to communicate effectively and efficiently with all levels of an organization resulting in effective, collaborative and profitable working relationships. Lisa has proven herself as a successful leader who is highly organized, versatile and thrives in a fast-paced dynamic environment.



## **Max Gardner, President and CEO, Orange County United Way; Chair, Orange County Funders Roundtable**

Max L. Gardner is the President and CEO of Orange County United Way (OCUW). In this position, Max oversees OCUW's operations and leads the nearly 90-year-old health and human services organization toward advancing its mission of improving lives by mobilizing the caring power of Orange County to strengthen our community. A former OCUW Board member and Tocqueville Society Co-Chair, Max was appointed President and CEO in July 2011. Prior to joining OCUW, Max was President of Irvine Company Apartment Communities, a wholly owned subsidiary of The Irvine Company. In this role, Max was responsible for all aspects of the company business including development, construction, acquisitions, property management, and finance. After 11 years of service, Max retired from the Irvine Company in July 2010. Max, who has more than 30 years of real estate experience, previously served as

Executive Vice President and Chief Operating Officer of Bay Apartment Communities, where he also served as a member of the company's board. Max currently serves on the Board of Directors for OC Forum, OC Partnership, GroundWork group and 2-1-1 Orange County, where he is Chairman. He is also a member of the Orange County Business Council, Orange County Funders Roundtable, and Health Funders Partnership of Orange County. Max holds a Bachelor of Arts Degree from Duke University and an MBA from the Business School at Georgia State University. He and his wife reside in Irvine, California, and have four children.



### **Holly Hagler, President and CEO, SeniorServ**

Holly Hagler is the President & CEO of SeniorServ, one of California's largest safety net non-profit agencies providing social, nutrition and health services to older adults and their families. SeniorServ provides 1.2 million meals annually to seniors in need in Orange County through senior center lunches and Meals on Wheels delivered to frail, homebound clients. The nonprofit also provides social services such as Adult Day Health Care, Case Management and innovative new programs designed to help older adults remain in their homes and in the community. Holly serves on the Board of Directors for the National Association of Aging & Nutrition & Service Providers, as Vice Chair of the Orange County Aging Services Collaborative and as Chair of the So Cal Care Transitions Collaborative. Holly's career spans nonprofits and senior-level for-profit business positions. She earned an MBA degree from the Kellogg School at Northwestern University and dual undergraduate degrees from the University of California, Irvine.



### **Diane Helfrey, Executive Director and Founder Social Venture Partners**

Diane developed extensive experience in strategic planning, finance, change management and process improvement working with large and small entrepreneurial for-profit organizations. She spent 10 years with Bank of America, most recently as Quality & Productivity Executive for the Asset Management Group, and then worked as an independent consultant. Over the years, Diane also volunteered as a consultant to nonprofits. She gained tremendous satisfaction from seeing the "ah-ha" moments created when talented people with different backgrounds blend their best ideas to tackle social issues. As a result, she became increasingly passionate about applying her skills to help social-purpose organizations make the world a better place. After moving back to California in 2004, she joined Social Venture Partners with its founding group in Los Angeles, and became the Executive Director a year later. SVP is a community of philanthropists who utilize their time, money, expertise and connections to promote philanthropy and to support innovative nonprofits in Los Angeles. Since its inception, SVP Los Angeles has awarded over \$640,000 in cash grants and contributed thousands of volunteer hours to over 130 nonprofits, including its multi-year grantees and Social Innovation Fast Pitch participants. From 2006-2010, she was also VP, Client Services for EdTec Inc., a business services provider for charter schools. Diane helped establish and grow EdTec's client base in Southern California, and provided back-office, strategic planning and other consulting services to clients. Diane serves on the board of Social Venture Partners International. She holds an MBA from the Stanford Graduate School of Business and a BA with honors in Management Science from the University of California, San Diego.

# Speaker Biographies



## **Shelley Hoss , President, Orange County Community Foundation**

Over the last 27 years, Shelley Hoss has combined the best of the nonprofit and corporate worlds to leverage tens of millions of dollars in funding for the good of the Orange County community. She has served as president of the Orange County Community Foundation ([www.oc-cf.org](http://www.oc-cf.org)) since 2000. Under her leadership, OCCF has emerged as the “center of gravity for philanthropy in Orange County,” a visible beacon to philanthropists, nonprofit leaders, and community advocates. Shelley has forged partnerships among donors, corporations and nonprofits to incubate new approaches to tackle major issues of importance to the community. Hoss was formerly executive director for Girls Incorporated of Orange County and associate executive director of Orangewood Children’s Foundation. She holds joint master’s degrees in business and public administration from the University of California, Irvine.



## **Gene Howard, Director, Orange County Alliance for Children and Families**

Gene Howard’s successful executive leadership experience encompasses a wide spectrum of organizations from directing a statewide governmental organization of 900+ staff to leading a medium sized nonprofit with a staff of 32 and an annual budget of \$2.4 million. This background has equipped him to bring value to organizations of any size and to assist them with their most challenging issues. His previous responsibilities included leading the Child Protective Services Departments for the State of Arizona and Orange County California, serving as the CEO of the Orangewood Children’s Foundation for 15 years and of the Court Appointed Special Advocates of Orange County for the past 4 years. Most recently Gene has accepted the position of Executive Director of the newly formed Orange County Alliance for Children and Families. In this capacity he will be responsible for developing the organization from the ground up. In addition to serving as a “C” level executive in a number of organizations, Gene has also had the pleasure of serving as a member of the board for several non-profit organizations providing him with the perspective of a board member as well as that of a staff person. In both capacities he has lead the effort to establish organizational visions, strategic and tactical plans and to implement those in daily operations. In his work Gene has done extensive public speaking, represented both public and private sector organizations in the media, testified before legislative committees in both California and Arizona, presented workshops and seminars at a multitude of conferences and handled crisis communications on a number of occasions for several organizations.



## **Michelle Jordan, Board Member, 2-1-1 OC, Principal and Founder, Jordan LLC**

Michelle Jordan is principal and founder of Jordan LLC, a consulting firm that assists CEOs, senior executives and their companies with issue and crisis communication challenges and reputation responsibility (enhancing, protecting, restoring). Clients range from CEOs and corporate board directors to entrepreneurs and high net worth individuals, and from public and private companies to non-profit organizations. In the nonprofit arena, Michelle serves on the Board of 2-1-1 Orange County and the Advisory Council of OneOC. She is immediate past Board Chair of One OC. Previous Orange County Board or committee involvements include Working Wardrobes, Girl Scouts Orange County, Susan Komen for the Cure. She is also a founding member of the United Way Women’s Philanthropy Fund.



### **Ed Kacic, President, Irvine Health Foundation**

Edward Kacic is the President of the Irvine Health Foundation, a position he has held since 1989. Mr. Kacic is the current past chair of the Health Funders Partnership of Orange County and chairs its Health Care Safety Net Task Force. He also serves on the Investment Committee of the Mardan Foundation of Educational Therapy. Mr. Kacic has been a Director since 2009.



### **Jessica LaBarbera, Director, Strategic Innovation, Nonprofit Finance Fund**

Jessica serves as Director, Strategic Innovation at Nonprofit Finance Fund (NFF) and in that role primarily focuses on supporting evolutions in the social impact investing space in addition to managing special initiatives and leading strategic consulting work with nonprofit clients. She has also served as NFF's California Market Director leading program growth and product delivery in California and overseeing initiatives statewide. Previously, she was a Vice President at Citi Community Capital, a division of Citigroup Global Markets Inc., where she provided structured financing and relationship management to national nonprofit and Community Development Financial Institution (CDFI) clients. Jessica has also served as a consultant to municipal government social service agencies, nonprofit advocacy organizations and direct service providers. She holds an MPA in Nonprofit Management from Columbia University's School of International and Public Affairs and a BA in Sociology from the University of Virginia.



### **Scott Larson, Executive Director, HomeAid**

Mr. Larson is the Executive Director of HomeAid Orange County, the founding chapter of a national non-profit organization with the mission to build and maintain dignified housing where homeless families and individuals can rebuild their lives. He is also a member of the board of directors of HomeAid America and chairman of the HomeAid America chapter advisory council. Established in 1989 by the Orange County Chapter of the Building Industry Association of Southern California (BIA/OC), HomeAid acts as the housing developer and liaison between service providers, community volunteers, builders and specialty contractors. Larson has more than 28 years of professional experience in the non-profit and building industries. He has received masters in business administration from the University of Phoenix, a bachelor's degree from Biola University and certificate in fundraising from the University of California, Irvine. Larson is a strong leader of homeless initiatives in Orange County and serves as the Chairman of Orange County's Commission to End Homelessness and has previously been a Commissioner for the Housing and Community Development Department of Orange County. He is also a director with Front Porch Communities and Services a network of not-for-profit communities offering a range of senior living levels of care and affordable housing. He also actively serves as a leadership coach in the Fieldstone Foundation Executive Coaching Network

# Speaker Biographies



## **Lynda Lawrence, Chief Idea Officer at Ideaworks Consulting, Faculty, UCI Merage School of Business**

Lynda has been an innovator for more than 20 years, working with organizations across a wide range of disciplines to develop new programs and environments that encourage creativity. Her work has won nearly 500 awards for creativity and effectiveness. She teaches Innovation and Design Management at UCI Merage School of Business, and is a graduate of Harvard's Executive Program in Innovation and Organizational Change. She has a Masters in Organizational Development from Pepperdine University's Graziadio School of Management, and taught creativity at Cal State Fullerton. She is the co-author of *Inventive Negotiation, Getting Beyond Yes*. Prior to her work as an innovation consultant, Lynda founded and led one of the top ten advertising agencies in Orange County, working with clients that included Apple, Taco Bell, Fatburger, California Pizza Kitchen, Peoplesoft, BusinessWeek, the Irvine Company and Edwards Life Sciences. She has worked with more than 60 local and national nonprofits, including CHOC Children's Hospital, California Department of Health Services, AIDS Services Foundation, Planned Parenthood, United Way, Second Harvest Food Bank and Goodwill Industries.



## **Geoff R. Le Plastrier, Board Member, Seneca OC**

Geoffrey Le Plastrier is President of LDC Advisors, an Irvine based pension fund real estate fiduciary and developer of master planned communities. The company's principal client is CalPERS, the largest pension fund in the US. His current board representations include director of Seneca Family of Agencies, Olson Urban Housing and Chairman of the Pacific Art Foundation. He was previously Chairman of Kinship Center and was a member of the transition team for that agency's merger with Seneca. He was also a member of the Seneca team for its merger with Canyon Acres. He resides in Corona del Mar and is a graduate of Harvard University, Massachusetts Institute of Technology and Concord Law School.



## **Jennifer Li Shen, Partner and Co-Founder, Blue Garnet**

Jennifer Li Shen holds an undying belief in our democracy, and cares most about making strategy real in the pursuit of lasting social change. She brings over 15 years of consulting experience to her role as Partner and Co-founder of Blue Garnet, a social purpose company that helps to transform organizations from good enough to truly great. Jennifer brings a unique combination of expertise in business strategy and organizational change with experience across sectors. She is comfortable pushing for innovation and asking the tough questions, and channels her inner maximizer to realize the potential in others and help them succeed. She enjoys helping clients create clarity on answering "So What?" – defining tangible success and impact and the "secret sauce" of each client to deliver on mission. Previously, Jennifer served Fortune 500 clients as a strategy consultant at Boston Consulting Group, where she developed and implemented business and market strategies, and organizational change. She has also worked at TCC Group and The Fannie Mae Foundation. Jennifer is a Founding Partner and former Board Director of Los Angeles Social Venture Partners, and was business advisor to the Los Angeles Social Enterprise Leadership Forum. She currently serves on the Social Impact Exchange Contributions Review Team and the Terry McAdams Book Award Committee. Jennifer holds an MBA from Yale University and a BA in Political Science with concentration in Public Policy from Swarthmore College. As wife and mother of three, she lives life to the fullest, and always strives to catalyze social change to create impact.



### **Edson McClellan, Partner, Rutan & Tucker**

Edson McClellan is a partner in the Orange County office of Rutan & Tucker and a member of the firm's Employment and Labor Section. His practice focuses on complex civil litigation matters. He has significant experience in litigation involving theft of company trade secrets, employee raiding, noncompetition agreements, breach of fiduciary duty, and contract disputes. His practice also involves all areas of employment law, including counseling and litigation. Edson has represented employers in lawsuits by individuals and class actions involving claims for unpaid wages, discrimination, harassment, retaliation, and wrongful termination. In addition, he represents executives

in compensation and termination disputes and regularly litigates in both federal and state court and before various administrative agencies. Edson is a frequent speaker on employment matters to professional groups, attorneys, and managers, and has authored several articles in local publications and law reviews, including the San Diego Law Review, the Southwestern Law Review, and the University of West Los Angeles Law Review.



### **Sister Eileen McNerney, Assistant General Superior of the Sisters of St. Joseph of Orange**

Sister Eileen McNerney has been a Catholic nun for 56 years. She currently serves as the Assistant General Superior of the Sisters of St. Joseph of Orange. She holds BA degree in history from St. Joseph College in Orange, an MA in educational administration from Claremont Graduate University and an MS in Counseling/Psychology from California State University in Fullerton. In 1992, Sister Eileen invited three other nuns to move with her to a gang-ridden neighborhood in Santa Ana, where gun shots and drug sales were commonplace. One hot summer evening she listened help-

lessly as a piercing cry rang through the open windows of her bedroom. It was the agonizing wail of a mother who had just lost her second son to gang violence. That moment marked a turning point for Sister Eileen in her resolve to develop a program that could move young people from violence to productivity. By bringing together sponsors representing local government, churches, corporations, foundations and private individuals, Sister Eileen opened a workforce training program in downtown Santa Ana for high-risk youth ages 18-28. She named the center Taller San Jose – St. Joseph's Workshop – after St. Joseph, the patron saint of workers. A talented painter, writer and public speaker, Sister Eileen authored her own book, *A Story of Suffering and Hope: Lessons from Latino Youth* (Paulist Press, 2005), which chronicles her dogged determination to find what it takes to walk wounded young people out of poverty. Sister Eileen served as Executive Director of Taller San Jose for 13 years before transitioning to the role of President Emerita in 2008. Her interest in the plight of immigrants and their children, arise from her awareness that it was her ancestors, who coming from Mexico with the Anza Expedition in 1775-76, opened the first overland route between Mexico and California, thus signaling a perpetual flow of immigrants from that time forward.

# Speaker Biographies



## **Pamela Pimentel, RN, Chief Executive Officer, MOMS Orange County**

Pamela Pimentel, RN, is the Chief Executive Officer of MOMS Orange County, a 22 year old nonprofit organization whose mission is to help families have healthy babies. MOMS Orange County provides access to prenatal care, health screenings, infant development screenings, health education and referral services through monthly home visits and group classes. Pamela brings over 38 years experience in Maternal Child Nursing and health care administration to MOMS Orange County, and a definitive passion for the health and well being of mothers and children. Pamela received her Degree in Nursing from San Bernardino Valley College in 1977, and a Bachelor's degree in Health Science from Chapman University in 1993, graduating at the top of her class. Pamela was one of OC METRO's "20 Women to Watch" in 2007 and in 2010, the Children and Families Commission of Orange County recognized Pamela as one of their "10 Agents of Change" to celebrate their 10-year anniversary. Pamela was honored by the March of Dimes in 2004 for "Excellence in Nursing Leadership", by the National Latina Business Women's Association in 2006 as the "Executive of the Year". Currently, Pamela is a co-PI with Dr. Yuqing Guo, UCI School of Nursing, conducting research on MOMS Orange County's model of community based, paraprofessional prenatal support services. Pamela serves as chair for the county-wide Low Birth Weight Task Force and chairs the Provider Advisory Committee for CalOptima. Recently, Pamela was nominated and elected to serve on the National Children's Health Study's Regional Community Engagement Committee. Pamela serves on the Children's Outcomes Project Committee for the Nemours Foundation, the Steering Committee for the Orange County Women's Health Initiative, and the CalOptima Quality Improvement Committee.



## **Dawn S. Reese, Executive Director and CO-CEO, The Wooden Floor**

Dawn S. Reese has leveraged 28 years of business and nonprofit management experience to be a life-changer for low-income youth and help propel The Wooden Floor forward. Dawn's unique blend of talent and experience working in business, arts, education, and technology adds to the mission-driven, business-minded focus of The Wooden Floor. In 2012, Dawn was promoted to Executive Director and Co-CEO and she has created organizational clarity focusing on aligning priorities with delivering impressive programs, increasing visibility for the organization, and driving results for the \$2.3M organization. Prior to The Wooden Floor, Dawn held arts management positions with Opera Pacific and Centennial Heritage Museum. She spent the first half of her career with The Oaktree Consulting Group, a management consulting firm for the high technology industry. Dawn is a mentor and presenter on topics of leadership development, board development, strategic planning, and arts-for-youth development. Currently, Dawn serves the Board of Directors for the Association of Fundraising Professionals Orange County, and is an active member of Association of Corporate Growth, Orange County Business Council, and Orange County Nonprofit Management Forum. In 2014, Dawn was a finalist for the CFO of the Year Award by the Orange County Business Journal for the nonprofit organization category.



**Tom Rogers, Chairman, Plaza Bank; Former United Way Board Member**

Tom Rogers actively supports several community and charitable organizations. He is a board member and past chairman of Memorial Health Services, a six hospital integrated healthcare system. He served for over twenty years and is a past chair of the board of Orange County United Way and after many years of board service is a trustee emeritus of the South Coast Repertory Theater and Orange County Museum of Art. In addition, Mr. Rogers serves as chair of the advisory council for The Center for the Study of Democracy at the University of California, Irvine. Previously, he has served on the boards of the Pacific Chorale, Arts Orange County, the Multicultural Arts

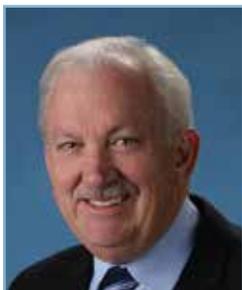
Council and the Detroit Hearing and Speech Center.



**Jerri Rosen, CEO and Founder, Working Wardrobes**

In 1990 Jerri Rosen was President of J.L. Rosen & Company, blending 25+ years of marketing communications experience in developing results-oriented planned giving and development programs for nonprofit organizations. At the same time that she started her own ad agency, Jerri and five friends found themselves disturbed by the growing statistics of domestic violence. The group set out on a mission to help. With the intention of hosting a onetime only event, they held the first ever “Day of Self-Esteem™,” which served 67 women from six shelters. The event became the launching pad for Working Wardrobes. In 1995 the organization received official nonprofit

status and in 2000 Jerri was hired on as the Executive Director. Today, Jerri is the CEO and Founder of Working Wardrobes, a nonprofit organization that helps over 5,000 men, women, veterans and young adults in crises re-enter the workforce each year with career development services and professional wardrobing. Since its conception, Working Wardrobes has served more than 75,000 clients in Orange, Los Angeles, Riverside, and San Diego counties in partnership with 50 local shelters and social service agencies. In a nod to Jerri’s entrepreneurial spirit, Working Wardrobes operates many successful social enterprises (including two upscale resale boutiques, two Thrift Shops, and the Career Success Institute), which account for more than 50% of the organization’s budget.



**Michael Ruane, Chief of Strategy and Public Affairs, CalOptima**

Michael Ruane serves as Executive Director of the CalOptima Foundation and Chief of Strategy and Public Affairs for CalOptima. In this role, Mr. Ruane is responsible for a broad range of departments, including Government Affairs, Regulatory Affairs, Community Relations, Communications, and Marketing and Outreach. He leads the development of CalOptima’s program and business strategies as well as oversees the communication of CalOptima’s mission to internal and external stakeholders. Mr. Ruane monitors legislative and regulatory activities affecting CalOptima and represents the agency at the county, state and federal level. He has more than 20 years of

experience working for the County of Orange in various positions, including as Assistant County Executive Officer for Strategic and Intergovernmental Affairs, and also served as Executive Director of the Children and Families Commission of Orange County before joining CalOptima. Mr Ruane received a Masters Degree in Architecture and Urban Planning from UCLA and currently serves as Chair of the Orange County District Council of the Urban Land Institute and OC Forum.

# Speaker Biographies



## **Shawna Smith, CEO, Taller San Jose**

Throughout her nearly twenty years in the social sector, Shawna Smith has brought a combination of good business sense and compassion to her work to alleviate poverty. Since 1998, Shawna has worked with Taller San Jose to advance the lives of thousands of young men and women marginalized by the limited opportunities and violence of their neighborhoods. Throughout her tenure at Taller San Jose, Shawna has led the development of numerous strategic initiatives including the launch of the construction training program which was integral to the development of the organization's current model for workforce training. In 2008, she took over the executive leadership reins successfully managing the transition of the organization's founding director. Most recently, Shawna lead the development of Hope Builders, Inc., a licensed general contracting and social enterprise venture that creates jobs for Taller San Jose's graduates. Shawna received her degree in English from Santa Clara University. She was named a Marano Fellow by the Aspen Institute in 2006 and was a finalist for the US Council of Bishops' Cardinal Bernardin Award in 2003. In 2012, she was named a 40 Under 40 Orange County by the OC Metro.



## **Nicole Suydam, CEO, Second Harvest Food Bank**

Nicole Suydam is a non-profit executive with more than 18 years of management and leadership experience working with local and national organizations dedicated to meeting human service needs. Nicole is currently the CEO of the Second Harvest Food Bank of Orange County, returning back to the organization where she served as Development Manager from 1997 to 2001. She most recently worked as Vice President of Development for Goodwill of Orange County from 2003 to 2012 where she led and oversaw all charitable giving, donated goods acquisition and community relations. Nicole received her B.A. degree in History and Political Science from Vanguard University of Southern California in 1995 and was awarded the Outstanding Young Alumnus Award in 2006. She also earned her certificate in fundraising from the University of California Irvine Extension in 2001 and her Certified Fund Raising Executive (CFRE) professional designation in 2004. In 2005, Nicole was recognized by the Nonprofit Times as one of the nation's "Top 10 Nonprofit Fundraisers Under the Age of 40" and named in 2011 by OC METRO as one of the "40 Under 40" top professionals in Orange County. Nicole and her husband Michael live in Aliso Viejo, California with their two daughters Lauren and Hannah.



## **Frank Talarico, President and CEO, Goodwill Industries**

Frank Talarico, Jr. is the president and CEO of Goodwill of Orange County since 2012. Talarico aggressively embraced the Goodwill mission to "help people who are facing barriers to finding employment" as his own. He is creating unique entrepreneurial programs and services that better reach existing and emerging target audiences. His most recent Goodwill start-up program is designed to market young veteran jobseekers by Launching unique programs, rebranding and expanding long-standing institutions are not new areas of focus for Talarico. Prior to joining Goodwill, Talarico served as the CEO of JSerra, a private Catholic school in San Juan Capistrano, where he was responsible for the school's increased enrollment, improved brand image, and significant debt reduction. Preceding this engagement, he was vice president of institutional advancement for Servite High School where he and his team changed the way the 45-year-old organization presented itself and grew the organization through dramatically increased profit. At Goodwill, Talarico has one goal in mind: serve more people in the community. Talarico's plan for the future growth of Goodwill of Orange County rests on specific goals

to increase Goodwill of Orange County's customer base; boost the profit contribution of the organization's social enterprises by improving operational efficiencies; raise greater awareness of the organization's mission in the community; and increase and focus resources on services that will help people facing barriers to get jobs. Today, not only is Talarico a top local business leader spearheading one of America's first social enterprises, but through his entrepreneurial spirit and innovative start-up programs, he is extending Goodwill of Orange County's influence and improving opportunities for the 115,000 people the organization is available to serve.



### **Jennifer Tankersley, Principal, NP Strategies**

Jennifer Tankersley was one of the founding thought-partners that created the NP Strategies concept. She is an experienced management consultant who brings together strong business acumen with a passion and understanding of the nonprofit sector. Since forming NP Strategies, Jennifer has worked with organizations spanning the nonprofit sector on issues related to growth, program development, sustainability and organizational change. Her clients have encompassed nearly all facets of the nonprofit sector including community development, philanthropy, arts, education, scientific research and youth development. In addition to her work in the nonprofit sector, Jennifer has worked with business clients as a management consultant at The Boston Consulting Group (BCG) and as an investment banker with Merrill Lynch. She continues to consult as an expert on change management and leadership coach. Jennifer earned a Master in Business Administration (MBA) with an emphasis in Strategy and Marketing from The Anderson School of Management at UCLA and a Bachelor of Arts in Economics and International Relations from Scripps College. She is an active community volunteer and has been involved with the San Diego Women's Foundation, National Charity League, Del Mar Pines Foundation for Giving and Clothes the Deal, among many others. Jennifer lives in Carmel Valley with her husband and three children.



### **Jack Toan, Vice President, Community Affairs Manager in Orange, San Bernardino, Riverside and San Diego Counties, Wells Fargo & Company**

Jack Toan is Vice President and Community Affairs Manager for Wells Fargo Community Relations. He joined Wells Fargo 2002. As part of Wells Fargo's Government and Community Relations team, Jack is responsible for managing the Wells Fargo Foundation's charitable giving and volunteerism programs in Orange, San Diego, Imperial, San Bernardino and Riverside counties. Toan has a proven background in community development and corporate philanthropy. He is a dedicated leader who is committed to responsible reputation management practices. Jack believes in creating social changes through action. He is committed to the community and currently serves on the Board of Directors of the Union of Pan Asian Communities, UCI Alumni Association, Illumination Foundation, UC Irvine Vietnamese American Community Ambassadors and the Community Partners Advisory Board for the OC Human Relations Council. He is a member of the Orange County Funders Roundtable, San Diego Grantmakers, and also is the founder and program consultant for a children's self-defense and safety awareness program in partnership with the Horizon Cross Cultural Community Center. Jack holds an MBA from UC Irvine's Paul Merage School of Business and is a graduate of the Southern California Leadership Network.

# Speaker Biographies



## **Paula Tomei, Managing Director, South Coast Repertory**

Paula Tomei (Managing Director) is responsible for the overall administration of SCR and has been managing director since 1994. A member of the SCR staff since 1979, she has served in a number of administrative capacities, including subscriptions manager, business manager and general manager. She was the president of the board of Theatre Communications Group (TCG), the national service organization for theatre, and served two terms as a board member. She has also served as treasurer of TCG, vice president of the League of Resident Theatres (LORT) and has been a member of the LORT Negotiating Committee for industry-wide union agreements. In addition, she represents SCR at national conferences of TCG and LORT; is a theatre panelist for the

National Endowment for the Arts (NEA) and the California Arts Council; site visitor for the NEA; and has been a guest lecturer in the graduate school of business at Stanford and UC Irvine. She is on the board of Arts Orange County, the county-wide arts council, and the board of the Nicholas Endowment. Paula graduated from UC Irvine with a degree in economics and pursued an additional course of study in theatre and dance. She also teaches a graduate class in nonprofit management at UC Irvine.



## **Scott Trotter, Executive Director, Child Abuse Prevention Center**

Scott Trotter is the Executive Director of the Orange County Child Abuse Prevention Center. The Cause/Organization collaborates with organizations all across Orange County to bring stability to at-risk families. With 15 programs aimed at different ages and stages of child development, and different risk factors, the organization aims at catching behaviors and health risks early. Our many formal and informal collaborative partners bring a focal point of child abuse prevention in to our participants' homes. Scott has an MBA from Northwestern University and work experience at Ernst & Young and Walt Disney prior to joining the nonprofit world.



## **Carla Vargas, Senior Vice President, Community Impact, Orange County United Way**

Prior to becoming Senior Vice President, Carla Vargas was Vice President of Investor Relations/Major Gifts, overseeing Orange County United Way's major donor circles including the Tocqueville Society (\$10,000+), Women's Leadership Council, as well as relationships with Orange County's million dollar roundtable donors and those donors, foundations and corporations wishing to make a special gift to a United Way community impact project. In this role, Carla created and launched new targeted affinity groups including industry groups (Bench & Bar and Real Estate Community

Builders), women's affinity groups (including the Women's Philanthropy Fund and Women Looking Forward), groups to cultivate and secure endowment and planned gifts (Loyal Contributors, Tocqueville Legacy Circle and Legacy Circle), and the newest group of "under 40" leaders contributing at a leadership level to United Way (Emerging Tocqueville Leaders) and served on the United Way Worldwide Major and Planned Giving Staff Leadership Council. Previously, Carla worked in community program development and community relations for Orange County United Way and has served as a volunteer and staff at several other granting, government and nonprofits locally and in the Bay Area in addition to serving as a part of the trademark/brand protection team at a boutique litigation firm. Carla holds a Bachelor of Arts in Political Science from the University of California, Berkeley and was recognized by OC Metro as one of Orange County's "40 Under 40." She is also a member of United Way's Emerging Tocqueville Leaders.



### **Margie Wakeham, Executive Director, Families Forward**

Margie Wakeham has been the Executive Director of Families Forward since 1992. Under her leadership the organization has grown from a 2-person operation in a small donated office space to the present staff of twenty six full-time and part-time employees servicing families in crisis in a 18,500 square feet, agency-owned Family Program Center. Margie has been instrumental in shaping Families Forward's programs and services. Families Forward initially served only 5 families in Irvine with transitional housing and case management. Now, the agency assists over 8,000 individuals a year throughout Orange County with a broad spectrum of services such as counseling, life skills education, career counseling, and advocated referrals, in addition to housing and case management. Margie was a founding Board Member of the O.C. Partnership, a member of the 10 Year Plan Committee, and an Executive Coach through Fieldstone Foundation for other non-profit leaders in Orange County. Ms. Wakeham has been active within the City of Irvine, serving as a member of the Board of Education of Irvine Unified School District from 1985 through 2002. She has received a variety of community recognition and most recently was recognized as Founder of the Year, November, 2013 by AFP at the National Philanthropy Day event.



### **Karen Williams, President and CEO, 2-1-1 Orange County**

Karen Williams is President and CEO of 2-1-1 Orange County (211OC), which has recently expanded through a merger with OC Partnership (OCP). Williams was previously Chief Operating Officer at OCP. Karen has over 30 years of experience in the field of consumer data and information, business development, telecommunications, database and internet marketing, sales and finance, as well as outreach programs. She held positions as VP of Sales at MatchLogic, VP of Business Development at The Polk Company, and was President of InfoBase Services. During her recent tenure at OCP, Karen had the responsibility to provide vision and leadership to the organization to achieve its mission, working with public and private agencies to pull together an effective, efficient, informed, and collaborative regional system of response to homelessness in Orange County. She continues this work as the leader of the new organization, building 211OC into a backbone organization for Orange County, providing information and referral coordination for all health and human services needs, leveraging the strengths of both entities.





