



1:30 - 1:45 PM ARRIVAL AND REGISTRATION

1:45 - 2:00 PM WELCOME AND OVERVIEW
(PACIFIC BALLROOM IV)

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

2:00 - 3:00 PM **Critical Challenges, Different Perspectives:
A Facilitated Discussion with Sector Stakeholders**
(PACIFIC BALLROOM IV)

Each voice represented in this candid panel discussion – a Funder, a CEO, an Emerging Leader, and a Board Chair – will articulate the challenges and opportunities *as they see them* being generated by the key issues highlighted in subsequent panels – new trends in raising funds, leadership transition, and developing relationships with community donors.

Dick Allen, Board Chair, Orange County
Community Foundation

Nicole Suydam, Vice President, Development,
Goodwill of Orange County

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

Gabriela Robles, Executive Director,
St. Joseph Health System Foundation

Shelley Hoss, Facilitator



DAY

3:15 - 4:30 PM BREAKOUT PANELS

Breakout 1: Candid Conversations with Major Donors
(EMERALD BAY I)

Panelists:

Dick Allen, Board Chair, Orange County Community Foundation
Vicki Ueberroth Booth, President, Ueberroth Family Foundation
Scott Green, Former CEO of Stratacare and Member of the OCCF Next Generation Philanthropy Group

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

Breakout 2: Leadership Succession
(EMERALD BAY II)

Cordula Dick-Muehlke, Ph.D., Executive Director, Alzheimer’s Family Services Center
Shawna Smith, CEO, Taller San Jose
Lisa Ackerman, Founder, Talk About Curing Autism (TACA)

Facilitated by **Pam Pimentel**, CEO, MOMS Orange County

Breakout 3: Donor Cultivation and Stewardship Strategies
(EMERALD BAY III)

Jim McAleer, President/CEO, Alzheimer’s Association of Orange County
Susan Hoover Miller, CFRE, Vice President of Major Gifts, Ocean Institute
Erin Gunther, Development Director, Orange County Community Housing Corporation

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

4:30 - 5:30 PM SUMMIT LAUNCH RECEPTION
FOUNTAIN TERRACE

7:30 - 8:00 AM REGISTRATION AND BREAKFAST
(FOYER/PACIFIC BALLROOM IV)

8:00 - 8:10 AM WELCOME and OVERVIEW

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

8:10 - 9:15 AM BREAKFAST KEYNOTE
(PACIFIC BALLROOM IV)

Giving Trends and Being an "Outlier"
Janes L. Doti, Ph.D., President, Chapman University

9:30 - 10:45 AM MORNING BREAKOUT SESSIONS

Session A:
Strategic Communications: Communicating for Results!
(EMERALD BAY I)

Presented by **R. Christine Hershey**, President,
Communications for Good

Session B:
***Adapting to a New Reality: Recreating Your
Nonprofit Business Model in a Changing Economy***
(EMERALD BAY III)

Presented by **David Greco**, Vice President, Western Region,
Nonprofit Finance Fund

11:00 -12 Noon DISCUSSION SESSIONS

Discussion A: ***Building Exceptional Boards***
(EMERALD BAY I)

Led by **Dan McQuaid**, CEO and President, OneOC
William R. Ford, SVP and Senior Client Manager,
Bank of America Merrill Lynch
Gary Van Arnum, Senior Vice President, Northern Trust
Kate Duchene, Chief Legal Officer and Executive Vice President,
Resources Global

Discussion B: ***Minding the Money***
(EMERALD BAY III)

Led by Nonprofit Finance Fund's **David Greco**, Director,
Western Region, and **Karla V. Salazar**, Director, Los Angeles Program.

Discussion C: ***The CEO-Board Partnership***
(EMERALD BAY II)

Led by **Vivian Clecak**, CEO, Human Options and
Shelley Hoss, President, Orange County Community Foundation
Artyn Gardner, Incoming Board Chair, Human Options
Susan Wampler, Chair-elect, Girls Inc.

12:00 - 1:15 PM NETWORKING LUNCH and VIDEO**1:30 - 3:00 PM AFTERNOON BREAKOUT SESSIONS**

Session A:
Strategic Communications: Communicating for Results!
(EMERALD BAY I)

Session B:
Adapting to a New Reality: Recreating Your Nonprofit Business Model in a Changing Economy
(EMERALD BAY III)

3:15 - 4:45 PM TOWN HALL DIALOGUE
(PACIFIC BALLROOM IV)

Facilitated by **Michael Ruane**, Executive Director, Children and Families Commission of Orange County, with Orange County Funders Roundtable Members

5:00 - 6:00 PM CLOSING RECEPTION
FOUNTAIN TERRACE