

**The Captain's Table**  
**Presented By**



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**Fall Session**

**1. Holding Ourselves Accountable – Temptations and Challenges that Guide Our Missions and Relationships with Stakeholders**

**September 15, 2010**

Led By Sheila Marsh of Peppergrass Partnerships

An exploration of barriers to excellence and opportunities for leadership related to our willingness to offer and demand accountability to and from foundations, donors, clients and peers.

**2. Board – Holding the Board Accountable: Building a Board that Delivers**

**October 13, 2010**

Led by Phyllis Katz of Sands Anderson

A discussion of techniques for building a strong board, building strong relationships with board members and dealing with ineffective board members.

**3. Getting at Critical Information for Board and Staff**

**November 10, 2010**

Led by Sheila Marsh of Peppergrass Partnerships

An examination of the types of information the board needs for effective oversight, methods of getting that information to the Board without crossing the line between board and management, and how to make the client experience visible to executive and board.

**4. Getting the Right People on the Bus; Getting the Wrong People Off the Bus**

**December 8, 2010**

Led by Phyllis Katz of Sands Anderson

Exploring what types of people you need to support your initiatives; how you can find the right person through accessible tools such as social media; and what tools are successful in reshaping, reorganizing, and letting go of those who do not contribute.

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**Place:** 2001 Maywill Street  
(near Staples Mill & Broad – behind the Anthem building)

**Time:** 8 AM – 9:30 AM  
Coffee and Pastry will be served



You are cordially invited to join  
**The Captain's Table**

A four-part discussion forum for a select group of executives of leading nonprofit organizations.

The Captain's Table is an initiative to bring leaders in the nonprofit community together to explore issues that pose significant challenges and opportunities in their organizations. In a discussion format, the participating nonprofit leaders will be able to share and evaluate alternatives to these challenges.

The Captain's Table is sponsored by Union First Market Bank with the support of Peppergrass Partnerships and Sands Anderson. It will be led by two nonprofit advisors, Phyllis Katz and Sheila Marsh (biographies attached). Topics for the fall session were chosen based on discussions that they have had with leaders in the nonprofit community. Phyllis and Sheila will frame the issues, provide background information to set a common frame of reference for the discussion, and lead the discussions. The topics and scope of the discussion will be guided by your interest and where the discussion leads. ***The fall session program is enclosed.***

**Registration:** There is no fee for participation in this four-part roundtable discussion. Please RSVP by telephone or e-mail to Dawn Hathaway at Union First Market Bank by September 10<sup>th</sup>. Participation will be limited to 25. Those who commit in the RSVP to attending at least 3 sessions will have priority. If there are still seats at the Captain's Table after September 10, others will be seated on a first come, first served basis. We will keep a waiting list if the series is oversubscribed. Phone: 327-5743 or E-mail address: [dawn.hathaway@bankatunion.com](mailto:dawn.hathaway@bankatunion.com).

**In the future:** If interest in continuing the discussions is there, The Captain's Table can continue through the winter and spring. In addition to those topics that participants select, other topics may include:

- The Art and Purpose of Storytelling
- Telling Our Stories - Effective Use of the Internet and Social Media
- Strategic Plans – Using our Stories to Build them; Making Them Come True