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The Premier Performance Management Event
for Public Sector and Non-Profit Organizations

THE MISSION-DRIVEN PERFORMANCE MANAGEMENT SUMMIT

Bringing Your Mission to Life through Performance Management

March 4-6, 2009 | Washington, DC, USA

Specifically designed for Non-Profit Organizations and Government Agencies, this dynamic summit features networking sessions, case studies and interactive presentations that will give you the insight to . . .

- ✓ Demonstrate impact and lasting results through performance management
- ✓ Ensure you're ready for growth (and the coming leadership "gap")
- ✓ Ensure capacity for organizational growth
- ✓ Do "more with less" by improving your organization's management
- ✓ Effectively partner with funders, customers, & affiliated organizations

PLUS: Function-specific breakout sessions covering performance reporting, succession planning, fundraising, change management. . . and more!

FEATURED SPEAKERS:

Allen S. Grossman

Harvard Business School and Author, *High Performance Nonprofit Organizations: Managing Upstream for Greater Impact*

Dr. Robert S. Kaplan

Co-creator of the Balanced Scorecard,
Baker Foundation Professor, Harvard Business School

Sue Dahling Sullivan

Chief Strategic Officer, Citi Performing Arts Center

Dr. Michael Arthur

Vice Chancellor, University of Leeds

Dr. Jon Meliones

Chief Medical Doctor, Duke Children's Hospital & Health Center

LEADING CASE STUDIES FROM:

FBI | Public Health Foundation | DC Central Kitchen | SEC

REGISTER
TODAY!

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or visit
www.gsmiweb.com



Presented by:



Sponsors:



10 REASONS WHY YOU CAN'T MISS THE MISSION-DRIVEN PERFORMANCE MANAGEMENT SUMMIT:

1. Learn about strategy execution from Balanced Scorecard creator Dr. Robert Kaplan
2. Attend a wide variety of sessions spread out across six topical tracks
3. Network with hundreds of managers, executives, and strategy experts representing non-profits, foundations, and government agencies
4. Interact with speakers in panel discussion sessions
5. Learn from award-winning case studies
6. Gain insights into leading non-profit & government solutions providers by attending the exhibit hall
7. Learn the secrets behind implementing performance management systems through attending the pre-summit workshops
8. Gain an understanding of how to engage your constituents through performance management
9. Learn practical examples of how to drive transformational change quickly
10. Spend three days in beautiful Washington, D.C.

WHO SHOULD ATTEND?

- ✓ Executive Directors
- ✓ Board Members
- ✓ Agency Directors
- ✓ State & Local Directors
- ✓ Program Managers
- ✓ Vice President / Director of Human Resources
- ✓ Vice President / Director of Finance
- ✓ Vice President / Director of Strategic Planning
- ✓ Management Analysts
- ✓ Program Analysts
- ✓ Performance Assessment Officers

Dear Colleague,

In today's uncertain world, the demands on social and public sector organizations have never been greater, yet the challenges of meeting those demands increase on a daily basis. Maximizing the use of limited financial resources, finding the right people to fill mission-critical positions, and managing initiatives while fulfilling the organizational mission have put a tremendous strain on non-profit organizations and government agencies all around the world.

In light of these challenges, it's very tempting to put strategy aside and focus on tactics and programs. But ignoring strategy in a changing landscape places your mission – indeed, your organization itself – at risk. Organizations need strategic insight to inform decisions on how best to allocate resources, adapt to changing realities in funding, and to energize employees and volunteers.

At the Mission-Driven Performance Management Summit, on March 4-6, 2009 in Washington, D.C., you will learn how to put strategy at the center of your operations and make strategy everyone's job. You will gain an understanding of how to generate value through executing strategy, and learn about such relevant topics as:

- ✓ Describing your strategy in a way that everyone – even board members – can understand
- ✓ Designing a metrics system that drives results and transparency
- ✓ Ensuring that your program investments remain aligned to your mission goals
- ✓ Aligning the organization to ensure focus on executing the mission
- ✓ Building a comprehensive performance reporting system
- ✓ Managing and driving transformational change

This comprehensive event features cutting-edge case studies spread out across six tracks and keynote sessions presented by Harvard Business School professors Allen S. Grossman and Robert S. Kaplan. With a speaking faculty of leaders from a diverse set of organizations in the social and public sectors, you will gain a deep understanding of performance management and how it can be used to generate lasting impact. In addition, you will have the opportunity to network with hundreds of fellow delegates representing government agencies, non-profit organizations, and foundations of all sizes.

To register for this exciting event, please visit us online at www.gsmiweb.com or give us a call at 888.409.4418.

I look forward to meeting you in Washington, D.C.!

Best regards,



Dylan Miyake
Managing Partner
Ascendant Strategy
Management Group



Byron Mignanelli
Managing Partner
Global Strategic Management Institute



KEYNOTE SPEAKERS

**Dr. Robert S. Kaplan, Co-Creator, the Balanced Scorecard**

Dr. Robert Kaplan is an internationally recognized performance management thought leader. Along with Dr. David Norton, he developed the Balanced Scorecard, a management tool that translates strategy into understandable terms and measurable results. He is the Baker Foundation Professor at Harvard Business School in addition to the Balanced Scorecard, he created Activity-Based Costing. His work has transformed the way businesses, non-profit organizations, and government agencies execute strategy.

**Tiziana Dearing, President, Catholic Charities of Boston**

Through using management tools such as the Balanced Scorecard (BSC), Catholic Charities of Boston has been able to articulate strategy clearly and link it to specific objectives which are related to the operations of the organization. In this linkage, the employees gain a deeper understanding of how their efforts contribute to the fulfillment of the organizational mission which can inspire greater individual performance. Tiziana Dearing will share how Catholic Charities of Boston uses its BSC to be a strategy-aligned organization.

**Dr. Michael Arthur, Vice Chancellor, University of Leeds**

Executing strategy is not just about brainstorming or generating new ideas, but it is about taking action in overcoming the hurdles that prevent achievement of organizational goals. With the BSC, an organization can translate strategy, create strategy-focused initiatives, and manage the change that is needed for establishing buy-in and inspiring action. Dr. Michael Arthur will share how the University of Leeds has used the BSC to drive the change and action that is needed to achieve greater levels of organizational performance.

**Sue Dahling Sullivan, Chief Strategic Officer, Citi Performing Arts Center**

The BSC provides the nonprofit organization with a path to align its operations to strategy. Through translating its strategic financial goals down to terms that employees can understand, the BSC can provide an actionable path to driving the fundraising success of the organization. In this session, you will learn how Citi Performing Arts Center uses the BSC to facilitate the achievement of financial goals and the alignment of operations to strategy.

**Robert Egger, President, DC Central Kitchen**

To realize greater levels of organizational performance, any nonprofit organization must endure the process of change. The difficulty that comes with the process of change can be alleviated based on the actions of organizational leaders in facilitating transitional efforts. With leaders effectively communicating change, resistance to change can be overcome and the support of employees for implementing change be won. In this session, you will learn how DC Central Kitchen communicates change and ensures employee buy-in to fulfill its mission.

**Allen S. Grossman, Professor of Management Practice, Harvard Business School**

Professor Allen Grossman is a renowned expert in management practices in the non-profit sector. Mr. Grossman founded the Going to Scale Project in 1994. This project led to the book, *High Performance Nonprofit Organizations: Managing Upstream for Greater Impact* and the article, *Virtuous Capital: What Foundations Can Learn from Venture Capitalists* published in the *Harvard Business Review*, both co-authored with Christine Letts and William Ryan. His current research focuses on the management practices of high performing nonprofit organizations.



“Perfect balance between theory and practice”

— Chief, National Security Administration

FEATURED CASE STUDIES



Using the Balanced Scorecard to Effect Major and Lasting Change

Undergoing change is an integral part of the journey organizations must take to achieve greater levels of performance. To generate positive results, change has to be managed and controlled. Through the Balanced Scorecard (BSC), the impact of change can be understood and the path to sustainable organizational performance can be planned. In this session, you will learn how Duke Children's Hospital uses the BSC to manage change in a way that will yield breakthrough results.

Dr. Jon Meliones, Chief Medical Doctor, Duke Children's Hospital & Health Center
Richard Ballard, Chief Operations Officer, Duke Children's Hospital & Health Center



Aligning the Workforce to Organizational Strategy

Individuals are the crucial component in the organization's ability to execute strategy. While organizational executives and managers are responsible for creating strategy and communicating it to employees, the individuals are responsible for bringing the strategy to life through their daily activities. Through making strategy relevant to the daily jobs of employees, managers can effectively develop an understanding amongst individuals of how their efforts contribute to organizational progress. In this session, you will learn how the FBI uses performance management to enable managers to align individuals to strategy and drive them to higher levels of performance.

David Schlendorf, Policy and Planning, Federal Bureau of Investigation (FBI)



Creating Alignment between Foundations, Donors, and Grantees

While performance measurement and assessment account for many of the activities that make up a nonprofit organization's performance management program, communication is essential in creating the alignment or cooperation that is needed to execute strategy. The Balanced Scorecard (BSC) and other proven performance management tools drive the communication process and break strategic objectives down to terms that all organizational stakeholders can understand. Through this method of facilitation, the donors, grantees, and other external stakeholders of your organization can gain exposure to your mission, vision, and purpose. In this session, you will learn how the Public Health Foundation uses performance management to inspire the cooperation and ensure the alignment of donors, grantees, and other external stakeholder to your strategy.

Ron Bialek, MPP, President, Public Health Foundation



Succession Planning: Filling the Void of Retiring Baby-Boomers

With the retirement of the baby-boomer generation from the public sector workforce, the pressure is on government agencies to fill the important mission-driven positions left open by recently retired professionals. As the baby-boomer generation has begun retiring from the public sector, the need to execute an effective succession plan has reached the highest possible levels. Through integrating succession plans into the organizational performance management system, succession planning efforts can be linked directly to strategy and enable the organization to prioritize these activities. Succession planning can receive attention through its integration with the organizational strategic execution efforts. In this session, you will learn how to overcome succession planning pressures through using performance management.

Jeff Risinger, Associate Executive Director, Office of Human Resources, U.S. Securities & Exchange Commission

“We modeled our long-term strategic plans based on information we took away. Outstanding event!”
 — CFO, Little Italy Association of San Diego

AGENDA-AT-A-GLANCE

DRIVE MEANINGFUL AND LASTING CHANGE

PRE-SUMMIT WORKSHOPS WED, MAR 4, 2009	8:30 AM	Continental Breakfast and Registration			
	9:00 AM	WORKSHOP A: Getting Started with the Balanced Scorecard – Government Organizations	WORKSHOP B: Getting Started with the Balanced Scorecard – Non-Profits	WORKSHOP C: Leadership Development and Employee Coaching	WORKSHOP F: Strategic Planning for Non-Profit Organizations
	12:00 PM	Networking Luncheon			
	1:00 PM	WORKSHOP D: Making Performance Reporting Effective through Management Meetings	WORKSHOP E: Strategic Initiatives: Launching the Strategy into Action		
	4:00 PM	Pre-Summit Reception			
	5:30 PM				

DAY ONE THURS, MAR 5, 2009	7:45 AM	Continental Breakfast and Registration		
	8:30 AM	Welcome and Introductions		
	THEME 1: Integrate Strategic Planning and Operational Execution to Drive Organizational Performance			
	8:45 AM	KEYNOTE SESSION: Creating a Strategy Execution Premium for Your Organization Dr. Robert S. Kaplan Co-Creator of the Balanced Scorecard		
	9:45 AM	Using the Balanced Scorecard to Effect Major and Lasting Change Dr. Jon Mellones, Duke Children's Hospital & Health Center Richard Ballard, Duke Children's Hospital & Health Center		
	10:45 AM	Morning Break		
	11:00 AM	Integrating Strategy into Day-to-Day Operations Tiziana Dearing, Catholic Charities of Boston		
	12:00 PM	Networking Luncheon		
	THEME 2: Aligning Your Organization to Execute Strategy			
	1:00 PM	Aligning Organizational Units and Employees Allen S. Grossman, Harvard Business School		
	2:00 PM	Performance Breakouts		
		Track A: Organizational Alignment A: Aligning the Workforce to Organizational Strategy David Schliendorf Federal Bureau of Investigation (FBI)	Track B: Leadership & Succession Planning B: Attracting and Training the Next Generation of Leaders in Non-Profits and the Public Sector	Track C: Integrating Strategy & Fundraising C: Using Your Balanced Scorecard To Drive Fundraising Success Sue Dahling Sullivan, Citi Performing Arts Center
	3:00 PM	Afternoon Break		
	3:15 PM	Performance Breakouts		
A: Creating Alignment between Foundations, Donors, and Grantees Ron Blalock Public Health Foundation		B: Succession Planning: Filling the Void of Retiring Baby-Boomers Jeff Risinger U.S. Securities and Exchange Commission	C: Financial Performance Panel Getting the Most Out of Limited Financial Resources & Improving Fundraising Results	
4:15 PM	PANEL DISCUSSION: Maximizing Program Effectiveness and Seizing Opportunities for Executing Strategy Dr. Robert S. Kaplan, Co-Creator of the Balanced Scorecard Laura Downing, Ascendant Strategy Management Group			
4:45 PM	Networking Reception			
6:15 PM				

DAY TWO FRI, MAR 6, 2009	7:45 AM	Continental Breakfast and Registration		
	THEME 3: Management Meetings to Monitor, Learn, and Adapt			
	8:30 AM	KEYNOTE SESSION: Creating a Strategy Execution Premium for Your Organization Dr. Robert S. Kaplan, Co-Creator of the Balanced Scorecard		
	9:30 AM	Driving Transformational Change with the Balanced Scorecard Dr. Michael Arthur, University of Leeds		
	10:30 AM	Morning Break and Exhibition Session		
	11:15 AM	Performance Breakouts		
		Track D: Performance Reporting & Analysis D: Establishing and Implementing a Comprehensive Performance Reporting System	Track E: Change Management E: Communicating and Implementing Organizational Change Robert Egger, DC Central Kitchen	Track F: Community Engagement F: Engaging Your Community with the Balanced Scorecard Debbie Jaffe, Chief Planning Officer, Fulton County Schools
	12:15 PM	Networking Luncheon		
	1:15 PM	Managing Organizational Capacity and Growth Jane Donahue, Vice President, Deaconess Foundation		
	THEME 4: Organizing to Generate Results			
	2:15 PM	Establishing an Office of Strategy Management (OSM) to Facilitate the Execution of Strategy Mark Langley, Executive Vice President & Chief Operations Officer, Project Management Institute (PMI)		
	3:15 PM	Q&A with Dr. Kaplan and Speakers		
3:35 PM	Summit Adjourn			

PRE-SUMMIT WORKSHOPS: WEDNESDAY, MARCH 4, 2009

**REASONS TO ATTEND THE PRE-SUMMIT WORKSHOPS:**

- 1) Gain a deeper understanding of important performance management tools and systems
- 2) Learn in an interactive and intimate environment
- 3) Get a hands-on approach to performance management through exercises and simulations
- 4) Learn from Ascendant Strategy Management Group experts.

**WORKSHOP A: Getting Started with the Balanced Scorecard – Government Agencies**

The Balanced Scorecard (BSC) is a management tool that translates strategy and communicates organizational progress in strategy execution. Through providing organizational assessments across its four perspectives (financial, customer, internal process, and learning / growth), the BSC can provide any government agency with a complete view of itself. In this comprehensive workshop, you will learn how the BSC works to ensure strategy execution, and gain an understanding of the anatomy of the BSC (strategy maps, measures, targets, initiatives).

WORKSHOP B: Getting Started with the Balanced Scorecard – Non-Profit Organizations

The Balanced Scorecard (BSC) is a management tool that translates strategy and communicates organizational progress in strategy execution. Through providing organizational assessments across its four perspectives (financial, customer, internal process, and learning / growth), the BSC can provide any non-profit organization with a complete view of itself. In this comprehensive workshop, you will learn how the BSC works to ensure strategy execution, and gain an understanding of the anatomy of the BSC (strategy maps, measures, targets, initiatives).

WORKSHOP C: Leadership Development and Employee Coaching

The development of employees is one of the most important performance indicators known to non-profit organizations and government agencies. Coaches, those employees who make those around them better, are needed to provide sound guidance to develop organizational leaders that will fill mission-driven positions being left open by retiring baby-boomers. Employees require coaches, not managers, to inspire and encourage their development. In this comprehensive workshop, you will learn the secrets behind effective coaching and how this can ensure the development individual employees.

WORKSHOP D: Making Performance Reporting Effective through Management Meetings

Collaboration is an important part of communicating and executing strategy. In management meetings, communication can break down as managers can fail to understand each other's successes and defeats in working toward strategy execution. Performance reporting eases the process of communication because performance measurements provide a common language through which managers, employees, and executives can understand each other. In this comprehensive workshop, you will learn how to enhance the effectiveness of your performance reporting capabilities to improve communication between managers, executives, and employees.

WORKSHOP E: Strategic Initiatives: Launching the Strategy into Action

Once your strategy map is constructed, performance measures are formed, and targets are created, it is imperative to form initiatives derived from organizational strategy. Initiatives are vital in focusing the organization on specific activities that advance the execution of strategy. In this comprehensive workshop, you will learn how to derive initiatives out of your BSC and use these initiatives to begin the organizational effort to execute strategy.

WORKSHOP F**STRATEGIC PLANNING FOR NON-PROFIT ORGANIZATIONS****FULL DAY INTERACTIVE WORKSHOP**

A vast majority of non-profit organizations fail to execute their strategies. Poor planning, inadequate communication of strategy, and a failure to translate strategy to understandable terms are just a few of the major reasons behind why strategy is not getting executed in non-profit organizations. In this comprehensive workshop, you will learn the fundamentals of creating a complete strategic plan and gain valuable insight into communicating strategy and establishing a clear direction for the future of the organization.

“Wonderful event. Speakers shared concepts, examples, best practices, for each strategic management area of interest. I’ll be back in the fall.”

— Director of Strategy, University of California San Diego (UCSD)

NETWORK. LEARN. ENJOY

“Excellent Conference! I feel like I received my moneys worth on the first day.”

— Director, St. Louis Children’s Hospital



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- ✦ Targeted networking
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- ✦ Easy to use online format



www.GSMIweb.com/community

Welcome Reception

Wednesday, March 4, 2008

4:00-5:30 PM

Don't miss this great opportunity to kick-off the conference, meet with peers, speakers and sponsors at the annual Mission-Driven Performance Management Summit!

Networking Reception

Thursday, March 5

4:45-6:15 PM

Cap of the day's activities with drinks and appetizers. Join our sponsors for prizes and or just enjoy and network with your peers. Ask us about our industry dinners!

One-on-One Meetings

We understand that networking and creating lasting contacts can be difficult at events. To help facilitate meetings we have introduced an electronic meeting system. It's simple, during registration you'll have the opportunity to opt-in. Two weeks prior to the event, We'll send out meeting information and you can start developing your meeting schedule before you arrive.

Discuss your organizations specific challenge, invite your entire team to the meeting, and be prepared for tough answers. All strategic meetings faciliated by Ascendant SMG.



ORGANIZERS, SPONSORS & MEDIA PARTNERS



Conference Organizers:



Ascendant helps social and public sector organizations increase their impact by building management capacity. We work with leading nonprofits, government agencies, and foundations to develop strategy management systems that enable organizations to better achieve their mission. We help organizations of all sizes to:

- ✓ Prove impact to stakeholders and donors
- ✓ Increase leadership and management effectiveness
- ✓ Develop organizational capacity for growth
- ✓ Align strategic and operational goals and projects

...allowing leadership teams to make decisions, manage board expectations, justify budgets, align resources with strategy and report results to stakeholders.

Sponsors:



ActiveStrategy helps public sector agencies improve strategic results by combining practical, Baldrige-based consulting with ActiveStrategy Enterprise (ASE) software. ASE is flexible, web-based software that automates and enables Balanced Scorecards, process management, performance improvement, strategic measurement (KPIs), and strategic dashboards. Easy-to-deploy system links organizational strategies to actionable objectives at every level.

Media Partners:



The Stanford Social Innovation Review is the leading publication for executives at nonprofits, foundations, and socially responsible businesses. Published by the Center for Social Innovation, Stanford Graduate School of Business, the quarterly journal brings together academic rigor and the expertise of leaders in corporate social responsibility, social entrepreneurship, nonprofit management, and philanthropy. www.ssireview.org

INTERESTED IN SHOWCASING YOUR SOLUTION TO OVER 300 NON-PROFIT AND GOVERNMENT LEADERS?

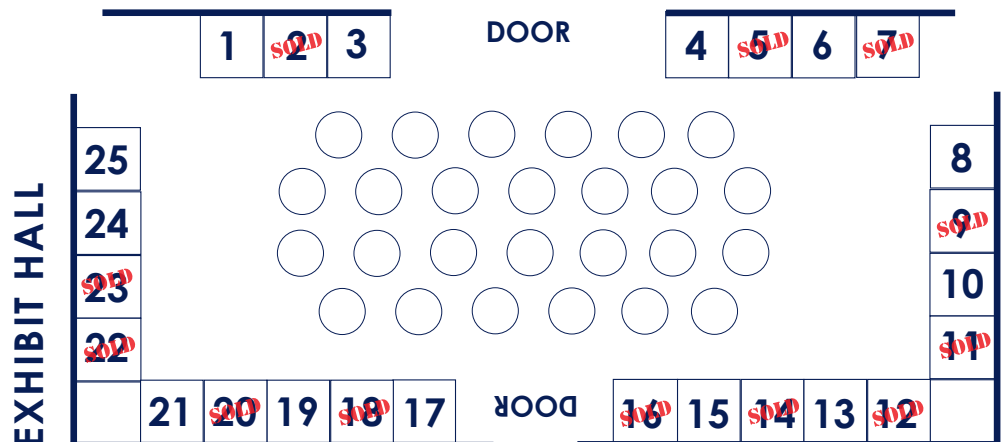


Exhibit Hours: March 4: 4PM-6PM, March 5: 8AM-6PM, March 6: 8AM-3PM
 For more information call or email Byron Mignanelli, byron@gsmiweb.com, 888.409.4418.

“Lots of real world examples that I can apply immediately.”

— Director, St. Louis Children’s Hospital

REGISTER TODAY! Fax completed forms to, 619.923.3542 or call, 888.409.4418.

REGISTER TODAY!

Name _____

Title _____

Department _____

Company _____

Mailing Address _____

City _____ State _____ Country (if applicable) _____

Telephone _____ Fax _____

Email _____

Will you be attending pre-conference workshops? (March 4th)
 _____ Yes _____ No

If so, which workshops?

- _____ **A** (Getting Started with the Balanced Scorecard – Government Organizations)
- _____ **B** Getting Started with the Balanced Scorecard – Non-Profits)
- _____ **C** (Leadership Development and Employee Coaching)
- _____ **D** (Making Performance Reporting Effective through Management Meetings)
- _____ **E** (Strategic Initiatives: Launching the Strategy into Action)
- _____ **F** ALL DAY (Strategic Planning for Non-Profit Organizations) Price: \$590

Payment Method: Credit Card Check

Credit Card Type _____ Credit Card Number _____

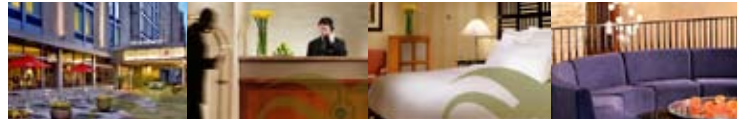
Expiration Date _____ Name on Card _____

Do you have any special dietary restrictions? (e.g. kosher, vegetarian)

_____Yes _____No

Do you require any accommodations that require special attention? (e.g. wheelchair access)

_____Yes _____No



HOTEL AND VENUE

The 2009 Mission-Driven Performance Management Summit will be hosted at the Renaissance M Street Hotel in Washington, DC. A block of rooms has been reserved at the discounted rate of \$249. To take advantage of the discount at the Renaissance M Street Hotel, please call (800) 468-3571 or (202) 775-0800 and mention the Global Strategic Management Institute rate.

Renaissance M Street Hotel | 1143 New Hampshire Avenue NW Washington, DC, 20037

TUITION

Individual Registration

Individual rates to attend the sessions of the Mission-Driven Performance Management Summit on March 4-6, 2009:

Pricing for Non-Profit and Government

Pricing	Summit Only	Summit + 1 Workshop	Summit + 2 Workshops or Workshop F
Early-early bird (register before Dec. 15, 2008)	Save \$200 \$795	Save \$200 \$1190	Save \$200 \$1390
Early bird (register before Jan. 31, 2009)	Save \$100 \$895	Save \$100 \$1290	Save \$100 \$1490
Regular	\$995	\$1390	\$1590

Pricing for Commercial Organizations

Pricing	Summit Only	Summit + 1 Workshop	Summit + 2 Workshops or Workshop F
Early-early bird (register before Dec. 15, 2008)	Save \$200 \$995	Save \$200 \$1390	Save \$200 \$1590
Early bird (register before Jan. 31, 2009)	Save \$100 \$1095	Save \$200 \$1490	Save \$100 \$1690
Regular	\$1195	\$1590	\$1790

Team Learning

Team learning pays! The following rates* apply for individuals in groups of five or more:

5+ people \$795
 10+ people \$695

To register a group or to find out more about group discounts, please contact Byron Mignanelli at 888.409.4418 or e-mail him at byron@gsmiweb.com.

*Note: no double discounts will apply

Sponsorships

To learn about sponsorship opportunities for this event, please contact Byron Mignanelli at 888.409.4418 or e-mail him at byron@gsmiweb.com