

Presented by:



2nd Annual MISSION-DRIVEN PERFORMANCE SUMMIT

Building and Sustaining a High-Performance Organization

March 2-4, 2010 • Sheraton National Hotel Arlington • Washington, DC, USA



FEATURING Balanced Scorecard Creators and World-Renowned Management Thought Leaders
Dr. Robert S. Kaplan & Dr. David P. Norton

PLUS: Function-Specific Breakout Sessions covering Strategic Management, Risk Management, Project Management, Portfolio Management, Operations Management. . . and more!

★ **Network with Hundreds of Strategy Management Professionals from Non-Profits, Federal Agencies, State and Local Governments, Foundations, NGO's, Religious Organizations, Public Education and more!** ★

Specifically designed for mission driven organizations, this dynamic summit features networking sessions, case studies and interactive presentations that will give you the insight to. . .

- Describing your strategy in a way that everyone can understand
- Developing a risk management strategy so you're ready for the unexpected
- Ensuring that your programs remain aligned to your mission goals
- Becoming operationally effective and aligned
- Building and using a comprehensive performance reporting system
- Adapting and transforming a changing workforce
- Managing and driving transformational change

★★★★ Register Today! Call **888.409.4418** or Visit www.MissionDrivenPerformance.org ★★★★★



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 Ascendant's **Second Annual Mission-Driven Management Summit**, on March 2-4, 2010 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 can understand
- Developing a risk management strategy so you're ready for the unexpected
- Ensuring that your programs remain aligned to your mission goals
- Becoming operationally effective and aligned
- Building and using 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 management gurus and Balanced Scorecard developers Dr. Robert S. Kaplan and David P. Norton. 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.missiondrivenperformance.org or give us a call at **888.409.4418**.

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

Best regards,

Laura Downing
Managing Partner
Ascendant Strategy Management Group

★ ★ ★ ★ ★ 10 ★ ★ ★ ★ ★

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

1. Learn how to manage economic challenges and trends with enhanced performance
2. Participate in panel discussions led by today's industry leaders
3. Hear how you can measure and improve employee engagement
4. Perfect your performance reporting
5. Gain an understanding of business analytics to drive strategy
6. Increase growth and innovation within your performance management system
7. Learn how to develop and implement risk management programs within the public sector
8. Liaise with today's industry leaders in non-profit and government agencies
9. Discover how to effectively implement the Balance Scorecard
10. Utilize customer insight to drive innovation

★ WHO SHOULD ATTEND? ★

Senior leaders, manager, strategy experts and more

- Executive Director
- All C-Level- CEO, COO, CFO, CAO, CSO, CIO
- Vice President / Director of Human Resources
- Vice President / Director of Finance
- Vice President / Director of Strategic Planning
- Program Directors
- Management Analysts
- Program Analysts
- Performance Assessment Officers

☆☆ Agenda-at-a-Glance ☆☆

Pre-Summit Workshops: Tuesday, March 2, 2010

8:30 Continental Breakfast and Workshop Registration

9:00 **Workshop Breakouts Choose: Workshop A, B or C**

WORKSHOP A:	WORKSHOP B:	WORKSHOP C:
Building the Aligned High-Performance Agency	Understanding The Balanced Scorecard(BSC)- Non-Profit And Foundation Edition	Leadership Development And Employee Coaching

12:00 Luncheon

1:00

Workshop Breakouts Choose: Workshop D, E or F

WORKSHOP D:	WORKSHOP E:	WORKSHOP F:
Optimizing The Accuracy Of Organizational Performance Reporting Capabilities	Enhancing Agency Effectiveness Through Portfolio Management	Understanding The Principles of Risk Management In Order To Create An Ideal Framework

4:00-5:30 Pre-Summit Reception

Day One: Wednesday, March 3, 2010

7:45 Continental Breakfast and Registration

8:30 Welcome & Introductions

8:45 KEYNOTE SESSION:
Innovate Strategies for Managing and Achieving your Mission
David P. Norton, Director, The Palladium Group and Founder, The Balanced Scorecard Collaborative

9:30 Driving Change Through Strategic Focus
Tiziana Dearing, President, Catholic Charities of Boston

10:20 Morning Coffee & Refreshments

10:35 Strategy Alignment To Transform An Organization
Colonel John Keeter, Chief, Assessment Division, Army Enterprise Task Force
Kimberly Mccabe, Deputy Director, Army Enterprise Task Force

11:25 KEYNOTE SESSION:
Risk Management for Non-profit Organizations
Robert S. Kaplan, Baker Foundation Professor, Harvard Business School

12:15 Luncheon

1:45 Bridging The Gap Between Risk Management And Organizational Strategy
Tom Harrington, Executive Assistant Director, Criminal Branch, FBI

2:35

**PERFORMANCE BREAKOUTS CHOOSE:
Track A: Strategy Management -or- Track B: Risk Management**

TRACK A:	TRACK B:
Building An Effective Strategy Management Program Kathy Augustine, Deputy Superintendent of Curriculum and Instruction, Atlanta Public Schools	Developing and Implementing Risk Management Programs within the Public Sector Nick Bako, Chief Risk Officer, Ontario Lottery and Gaming

3:25 Afternoon Refreshments

3:40

PERFORMANCE BREAKOUTS CHOOSE: Track A Or B

TRACK A:	TRACK B:
Communicating Strategy Effectively To Your Board Of Directors Kathy Quense, Acting CEO, ACCION*	Risk Management Maturity Process In The Federal Government Cynthia Vitters, Dept of Education

4:30 Panel Discussion

5:00-6:15 Networking Reception

* Invited

Day Two: Thursday, March 4, 2010

7:45 Continental Breakfast

8:30 KEYNOTE SESSION: Managing Accelerated Growth by Managing Projects and Strategy Together
Mark Langley, Chief Financial Officer and COO, PMI

9:15 KEYNOTE SESSION: Using the Balanced Scorecard to Effect High Impact and Lasting Change
Jon Meliones, Chief Medical Director, Duke Children's Hospital

10:00 Morning Coffee & Refreshments

10:15 From Human Resources to Human Capital: Capitalizing On Asset-Based Thinking
David P. Norton, Director, The Palladium Group and Founder, The Balanced Scorecard Collaborative

11:10

**PERFORMANCE BREAKOUTS CHOOSE:
Track D: Project Management - or Track E: Human Capital**

TRACK D:	TRACK E:
Aligning Programs And Projects To The Organization Strategy Dale Galvin, COO, Rare*	Human Capital as a Competitive Advantage Jeff Risinger, Associate Executive Director, Office of Human Resources, U.S. Securities and Exchange Commission

12:00 Luncheon

1:00 International Government Case Study

1:50 Sustaining Change through a Strategy Management Office
Laura Downing, Founding Partner, Ascendant Strategy Management Group

2:40 Case Study: TBD

3:30 Keynote Q&A

4:00 Summit Adjourns

* Invited

☆☆ Keynote Speakers ☆☆



Dr. Robert S. Kaplan,
Co-Creator of the Balanced Scorecard and Baker Foundation Professor,
HARVARD BUSINESS SCHOOL

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 and the godfather of activity-based costing. His work has transformed the way businesses, non-profit organizations, and government agencies manage strategy. Elected to the Accounting Hall of Fame in 2006, he received the Lifetime Contribution Award for Distinguished Contributions to Advancing the Management Accounting Profession from the Institute of Management Accountants in 2008, and the Lifetime Contribution Award from the Management Accounting Section of the American Accounting Association (AAA) in 2006. The American Accounting Association selected his co-authored book, *Relevance Lost: The Rise and Fall of Management Accounting* for the Seminal Contribution to Accounting Literature Award. The Financial Times included him in its 2005 list of Top 25 Business Thinkers.



David P. Norton, Director, THE PALLADIUM GROUP
and Founder, THE BALANCED SCORECARD COLLABORATIVE

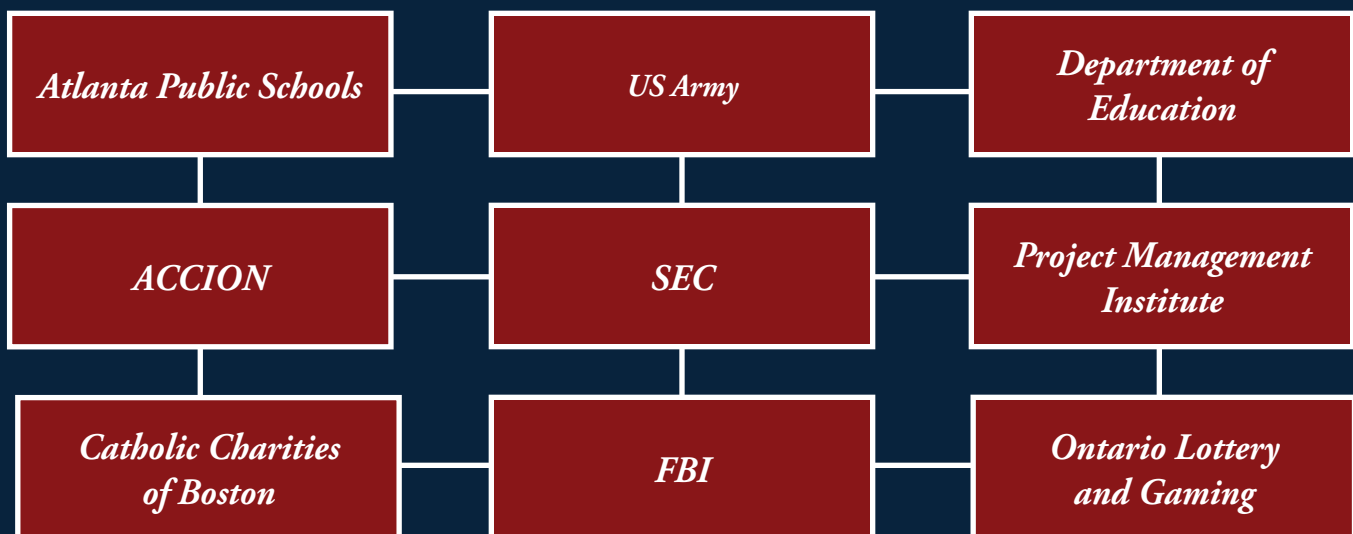
David P. Norton is the preeminent authority on how to institutionalize strategic thinking using The Balanced Scorecard (BSC). Dr. Norton co-developed this extraordinary tool for defining and executing business strategy. He co-authored with Robert S. Kaplan, the three essential books on The Balanced Scorecard. David Norton is also the co-founder, president and CEO of the consulting firm that helps organizations use the BSC successfully. In his presentations, Dr. Norton helps companies make effective strategic thinking and execution an essential part of their business, both at the top (through the equivalent of a Chief Strategy Officer) and throughout the organization.



Tiziana Dearing, President,
CATHOLIC CHARITIES OF BOSTON

Creating a strategy-aligned organization involves the cooperation of managers and employees in making sure that the daily activities and functions of the organization are relevant to strategy. Through using management tools such as the Balanced Scorecard (BSC), strategy can be articulated clearly and linked to specific objectives which are related to the operations of the organization. In this linkage, the employee can gain a deeper understanding of how his or her efforts contribute to the fulfillment of the organizational mission which can inspire greater individual performance. In this session, you will learn how Catholic Charities of Boston uses its BSC to be a strategy-aligned organization.

☆☆ Featured Case Studies ☆☆



☆☆ Pre-Summit Workshops ☆☆



3 Reasons to Attend the Pre-Summit Workshops:

1

Gain a deeper understanding of important management tools and systems

2

Learn in an interactive and intimate environment

3

Get a hands-on approach to effective management through exercises and simulations



— Tuesday, March 2, 2010 —

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 (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 (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-critical 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 Road 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

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



“Outstanding conference. We will be returning in 2010.”

- Director,
Federal Reserve Bank
of Richmond

“Great speakers, great networking, great experience.”

- Executive Director, UNICEF

“Great experience. The conference provided me the tools, insights, and examples I was looking for.”

- Director, CARAT



Drive Meaningful and ☆☆☆ Lasting Change ☆☆☆

☆☆ Conference Organizer ☆☆



Ascendant is a different kind of consultancy. Our mission is to help social and public sector organizations increase their impact. We work with leading nonprofits, government agencies, and foundations to develop performance management systems that enable organizations to better achieve their mission.

Ascendant was founded by strategy management experts with a passion for making a difference in the world. Our focus is on advancing management of non-profits, associations, and foundations. We believe we can do this by working closely with our clients in implementing strategy management and measurement frameworks as well as creating a collaborative environment to help them work closely with their donors and peers to accomplish their missions.

Our founding staff and connected partners all have more than 10 years of experience in implementing the Balanced Scorecard, but they also have extensive experience in working with non-profit organizations. We have helped large government organizations as well as small regional non-profits. We have worked closely with foundations and associations. Our work is typically at the senior executive level and directly with the board of directors.

☆☆ Sponsor ☆☆



ClearPoint is an easy to use scorecarding solution designed to help organizations manage strategy. ClearPoint helps organizations translate strategy into action by managing strategy review meetings, automating Balanced Scorecards, and tracking key projects and initiatives. By coordinating all the little tasks you need to keep track of, ClearPoint makes it easy to manage strategy.



Founded in 2000 by human services professionals, our ETO (Efforts to Outcomes) software and services give organizations a clear picture of which efforts are having the greatest impact on the social issues they strive to address.

With this knowledge, organizations can reinforce what's working, adjust what isn't, and more easily report quantified successes to key stakeholders.

Registration: 2nd Annual Mission-Driven Performance Summit

Building and Sustaining a High-Performance Organization

March 2-4, 2010 • Washington, DC, USA

REGISTRATION FEE:	Early-early-bird by 11/15/09	Early-bird by 1/15/10	Regular
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Pricing for Non-Profit Organizations			
Summit only	<input type="checkbox"/> \$795 <small>Save \$200</small>	<input type="checkbox"/> \$895 <small>Save \$100</small>	<input type="checkbox"/> \$995
Summit + 1 Workshop	<input type="checkbox"/> \$1090 <small>Save \$200</small>	<input type="checkbox"/> \$1190 <small>Save \$100</small>	<input type="checkbox"/> \$1290
Summit + 2 Workshops	<input type="checkbox"/> \$1190 <small>Save \$200</small>	<input type="checkbox"/> \$1290 <small>Save \$100</small>	<input type="checkbox"/> \$1390

Pricing for Commercial Organizationst			
Summit only	<input type="checkbox"/> \$995 <small>Save \$400</small>	<input type="checkbox"/> \$1195 <small>Save \$200</small>	<input type="checkbox"/> \$1395
Summit + 1 Workshop	<input type="checkbox"/> \$1190 <small>Save \$400</small>	<input type="checkbox"/> \$1390 <small>Save \$200</small>	<input type="checkbox"/> \$1590
Summit + 2 Workshops	<input type="checkbox"/> \$1390 <small>Save \$400</small>	<input type="checkbox"/> \$1590 <small>Save \$200</small>	<input type="checkbox"/> \$1790

TEAM LEARNING

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

5+ people: \$695

10+ people: \$595

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

*Please note that double discounts cannot be applied



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ADMINISTRATIVE NOTE:

For cancellations received in writing →	Four weeks or more prior to the event: Full refund or Full Credit Voucher
	Four weeks or less prior to the event: No Refund; a Credit Voucher minus the \$300 cancellation fee
	If you do not cancel your registration by the day of the event you will be charged your full registration fee

Credit vouchers may be applied toward any future GSMI event within one calendar year of the date of the cancellation. If GSMI decides to cancel any part of this event, the Company is not responsible for covering airfare, hotel or any other costs. Speakers, agenda, networking and recreational events are subject to change without notice. For more information regarding refunds please contact the customer service department at: 888.409.4418, ex. 1

SUBSTITUTION POLICY:

Substitutions may be made up to the day of the event

PAYMENT POLICY:

Payments can be made by American express, Visa, MasterCard, Company Check (USD checks must be drawn on a US bank), or by wire transfer.

If registering 2 weeks or less prior to the start of the Conference, you must submit your credit card information as a form of payment. If registering more than 2 weeks prior to the start of the Summit and payment is not received at the time of registration, a credit card hold will be required to maintain your registration status. If payment is not received 2 business days prior to the conference date, the respective credit card will be utilized as the form of payment. Please make all checks payable to Global Strategic Management Institute. In the memo area of the check please write the name(s) of the 2nd Annual Mission-Driven Performance Summit registrants(s).

GSMI OFFERS 6 WAYS TO REGISTER

Tel: 888.409.4418, ex: 1
Monday - Friday 8:00 a.m. - 6:00 p.m. US Pacific Time

Mail: 1501 India St.
Suite 103-60
San Diego, CA 92101

Email: Byron@gsmiweb.com
Please include your name, telephone number.

Fax: 619.923.3542
24 Hours a Day

Scan: Completed registration forms can be emailed to: Byron@gsmiweb.com

World Wide Web: www.gsmiweb.com

Please fill in the following information and fax back to: (619) 923-3542
Please submit one form for each delegate attending.

Name: _____

Title: _____

Department: _____

Company: _____

Mailing Address: _____

City: _____ State: _____

Zip/Post Code: _____ Country: _____

Telephone: _____ Fax: _____

Email: _____

Will you be attending any pre-summit workshops (March 4)?

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 (Strategic Planning for Non-Profit Organizations)

Payment Method:

Credit Card: Amex Visa MasterCard Check

Credit Card Number: _____

Name on Card: _____

Expiration Date: _____

Do you have any dietary restrictions (e.g. kosher, vegetarian)? Yes No

If so, please specify: _____

Do you require any accommodations that require special attention? Yes No

If so, please specify: _____

(e.g. wheel-chair access)

VENUE:

The 2nd Annual Mission-Driven Performance Summit will be hosted at the Sheraton National Hotel Arlington in Washington, DC. A block of rooms has been reserved at the discounted rate of \$229. To take advantage of the discount at the Sheraton National Hotel Arlington, please call 703.521.1900 and mention the GSMI discount.

Sheraton National Hotel Arlington
900 South Orme Street
Arlington, VA 22204
(703) 521-1900

EXHIBITION AND SPONSORSHIP INFORMATION:

To learn more about exhibiting at this year's 2nd Annual Mission-Driven Performance Summit, please contact Byron Mignanelli at 888.409.4418 or e-mail him at Byron@gsmiweb.com.

A limited number of table-top and booth exhibits will be open during the course of the event. Sponsors/Exhibitors will have the opportunity to promote products and services of special interest to conference attendees.