



GOVERNANCE WEBINAR SERIES

January 8 | January 15 | January 22 (3p-4p) | January 29

2:00 pm – 3:00 pm EST

This program has been approved for Continuing Education for 4 total participant hours by NAB/NCERS—approval #20270107-4-A117237-DL.

1 NAB credit will be awarded per full session attended.

About the Series:

Strong governance is the cornerstone of a thriving organization. Both your board and your leadership team play essential roles in ensuring sustainability, advancing your mission, and keeping quality care at the center of all you do. This webinar series is designed to guide you in strengthening that partnership and equipping your organization for the future.

You'll explore how to recruit and onboard the right board members and how to inspire deeper board engagement in philanthropy and resource development. We'll also open space for a candid, strategic look at affiliation, recognizing that even if it isn't on your immediate horizon, it's a conversation every organization benefits from having before urgency dictates the terms. Finally, we'll examine the legal implications of AI in aging services, helping you and your board understand both the opportunities and risks that come with emerging technologies.

This series is built for you, your leadership team, and your board. When governance is strong, your organization is positioned to thrive today and in the years ahead.

Following this series, you will be able to:

- Strengthen governance as the cornerstone of your organization's mission, sustainability, and quality of care.
- Identify effective strategies for recruiting and onboarding board members who bring the right skills, perspectives, and commitment.
- Explore ways to inspire and engage your board in philanthropy and resource development.
- Consider affiliation readiness as a proactive, strategic conversation, whether or not it's part of your current plan, so your organization is prepared when opportunities or challenges arise.
- Understand the emerging legal implications of artificial intelligence in aging services and how your board can help your organization navigate risks and opportunities.

Individual session information is detailed on the following pages.



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Recruiting for Mission, Onboarding for Impact

Josh Lyons, President & CEO, Sunnyside Communities

Heather Turbyne-Pollard, CEO, Circle Center Adult Day Services

Jeannie Shiley, President & CEO, Shenandoah Valley Westminster-Canterbury

Building an effective board starts with intention. Recruiting and onboarding are more than processes. They're opportunities to strengthen alignment with your organization's mission, values, and strategy. In this panel discussion, experienced leaders will share how they identify and welcome board members who bring the right skills, perspectives, and passion to the table.

You'll hear real-world examples of what works, from refining recruitment to ensure diversity of thought and experience, to designing onboarding that helps new members contribute meaningfully from the start. Whether you're seeking new approaches or refining what already works well, this conversation will offer practical strategies to help your organization recruit with purpose and onboard for lasting impact.

Following this session, you and your board will be able to:

- Align board recruitment and onboarding practices with your organization's mission, values, and strategic priorities.
- Identify the skills, perspectives, and experiences that strengthen your board's effectiveness and diversity.
- Apply proven strategies to recruit board members who are both mission-driven and ready to contribute meaningfully.
- Design or refine onboarding processes that equip new members to engage confidently and add value from the start.
- Strengthen collaboration between board and staff leaders in cultivating a cohesive, high-performing board.



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Inspiring Why: Engaging Boards in Meaningful Philanthropy

Joe Hackman, Chief Philanthropy Officer, Virginia Mennonite Retirement Community

Marta Hill Gray, President, Culpeper Garden

Gayle Haglund, Founder, GHH Philanthropy Solutions

Betsy Archer, Executive Director, PositiveAge, a LeadingAge Virginia Foundation

When board members understand the “why” behind philanthropy, their engagement shifts from obligation to genuine enthusiasm for advancing the mission. This session explores how to help your board connect giving and fundraising to purpose, seeing philanthropy not as a task, but as an expression of leadership and stewardship.

Through real-world examples and shared experiences, you’ll learn practical ways to inspire your board’s involvement in resource development and mission advancement. Whether your organization is refining an established culture of philanthropy or building one intentionally, you’ll leave with ideas to help your board lead with purpose, champion generosity, and strengthen the sustainability of your mission.

Following this session, you and your board will be able to:

- Articulate the connection between philanthropy and mission, helping board members understand why their engagement matters.
- Identify strategies to inspire board members to take an active, authentic role in fundraising and resource development.
- Strengthen your organization’s culture of philanthropy by aligning board engagement with organizational values and goals.
- Recognize common barriers to board participation in philanthropy and apply practical approaches to overcome them.
- Reinforce a shared sense of purpose between staff and board leaders in advancing generosity and mission sustainability.



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Ready By Choice, Not By Chance: Strategic Affiliation Planning

Aaron Rulnick, Managing Principal, Head of Investment, HJ Sims

Tom Bowden, Senior Vice President, HJ Sims

Kevin Schwab, President & CEO, Givens Communities

Cherie Grisso, Vice President Financial Operations, Givens Communities

Affiliation discussions can feel complex, and even uncomfortable, but they're an essential part of strong, forward-looking governance. Whether or not affiliation is on your organization's current agenda, thinking about it now allows your board and leadership team to approach the future with clarity rather than urgency.

In this session, you'll explore how to frame affiliation as a proactive, strategic conversation that strengthens your organization's long-term position. Together, we'll look at how boards and leadership teams can evaluate readiness, identify the questions worth asking early, align decisions with mission and values, and understand the legal considerations related to affiliation. You bring the deep understanding of your organization, and we'll bring tools and perspective to help you lead the conversation with confidence and purpose.

Following this session, you and your board will be able to:

- Frame affiliation as a proactive and strategic conversation that supports your organization's mission and long-term goals.
- Assess your organization's current level of readiness for potential affiliation opportunities or challenges.
- Identify key questions and indicators to guide thoughtful discussions before decisions become time-sensitive.
- Clarify the board's and leadership team's respective roles in exploring, evaluating, and preparing for affiliation.
- Apply strategies to ensure affiliation conversations are grounded in mission alignment, transparency, and informed decision-making.



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Governing in the Age of AI: Legal Considerations for Aging Services

John Mumford, Partner, Hancock Daniel

Nathan Mortier, Attorney, Sands Anderson

Dusanka Delovska-Trajkova, CHCIO, CDH-E, Chief Information Officer, Ingleside

Artificial intelligence is reshaping how organizations operate, from data management and staffing to resident engagement and care delivery. With opportunity comes responsibility, and nonprofit leaders and boards play a vital role in ensuring that innovation aligns with mission, ethics, and the law.

This session will explore the evolving legal landscape surrounding AI in aging services, including issues of privacy, data security, bias, and accountability. You'll gain a clearer understanding of what questions to ask, what safeguards to consider, and how to approach AI decisions with confidence and foresight. Together, we'll look at how governance and leadership can work in partnership to guide responsible, mission-centered adoption of AI technologies.

Following this session, you and your board will be able to:

- Recognize key legal and ethical considerations surrounding the use of artificial intelligence in aging services.
- Identify questions boards and leadership teams should be asking as AI tools and technologies are introduced.
- Understand potential risks related to privacy, data protection, bias, and accountability, and how to mitigate them.
- Clarify the board's and leadership team's roles in overseeing responsible, mission-aligned adoption of AI.
- Apply practical strategies to ensure AI decisions support both innovation and the organization's core values.