

# Executive Leadership CFO/COO Retreat Agenda Day 1

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April 16, 2026 / 11:30am - 6:00pmCT

## AGENDA

**11:30am: Registration, Lunch, and Fellowship**

**12:00pm-12:45pm: Welcome and Introductions**

- Dr. Kevin Dean, Tennessee Nonprofit Network

**12:45pm-1:15pm: Strategic Card Exchange and Speed Networking**

- Engage in rapid, focused networking with fellow nonprofit leaders. Guided by thought-provoking challenge cards, participants will share insights and experiences, fostering valuable connections and collaborative opportunities.

**1:15pm-2:15pm - Trends in Human Resources**

- Presented by Amanda McCollum, Adams Keegan

**3:15pm - 3:30pm Break**

**3:30pm-5:00pm Today's Nonprofit Financial Leader: From Compliance to Strategy**

- Led by Joshua Ireland, Jefferson Bridge Capital & Phillip Many, St. Luke's Community House
- This session will guide financial leaders beyond the traditional focus on compliance and routine reporting to embrace a proactive, strategic role in their organization. Learn how to transform financial data into powerful insights that inform decision-making, drive mission success, and ensure long-term sustainability. We'll explore key shifts in thinking and practical tools to move from simply managing the books to actively shaping your nonprofit's future.

**5:30pm-6:30pm Happy Hour in West End**

- Join us for a happy hour in the West End area!

**6:30pm-8:00pm Optional Dine-Arounds**

- Don't eat on your own (unless you want to!) Participants who would like to dine together will gather to go to dinner (*not included with registration*).

Tennessee Nonprofit Network

# Executive Leadership Retreat

## Agenda Day 2

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April 17, 2026 / 8:30am - 4:00pmCT

### AGENDA

**8:30am: Registration, Breakfast, and Fellowship**

**9:00am-9:15am: Welcome and Recap**

- Dr. Kevin Dean, Tennessee Nonprofit Network

**9:15am-11:15pm: World Cafe**

- The World Café format is a participatory approach that encourages open dialogue, shared learning, and collective wisdom. Participants will move from table to table every 30 minutes, engaging in brief conversations around each topic facilitated by experts. Topics will include:
  1. Co-leading with your CEO (led by Kaitlin Dastugue)
  2. Financial storytelling (led by Josh Ireland)
  3. Strategic budgeting (led by Phillip Many)
  4. Managing difficult employees (led by Amanda McCollum)
  5. Change management (led by Kevin Dean)

**11:15am-12:00pm: The Fish Bowl**

- Led by Dorian Hines, Tennessee Nonprofit Network
- The fishbowl format is a group discussion technique where a small "inner circle" actively debates a topic while the larger "outer circle" observes and listens intently, promoting deep focus and active listening. By using an "open fishbowl," participants can dynamically enter and exit the inner discussion, ensuring a

continuous flow of fresh perspectives and democratizing the conversation. Each topic will be debated for 10 minutes. Potential topics will include:

1. Revenue and reserve building
2. Multi-year grant compliance
3. Being “audit-ready”
4. Staff retention/employee benefits
5. CFO/COO cross-functional alignment
6. Cybersecurity
7. Systems streamlining

**12:00pm–1:00pm: Lunch**

**1:00pm–2:00pm: The Season of Your Organization**

- Led by Candace Surface, Day 7
- This workshop offers a guided reflection to help you identify the current operational "season" of both yourself and your organization—whether you are in a time of rapid growth (Spring), high productivity and demanding output (Summer), necessary harvesting and adjustment (Autumn), or essential rest and strategic planning (Winter). We'll use this dedicated time to name the reality of your current state, prioritize the actions that truly matter right now, and plan realistic next steps that align with your energy and resources. This session is designed to prevent burnout by replacing perpetual "full speed ahead" thinking with cyclical, sustainable strategies, ensuring your efforts lead to long-term health and impactful results.

**12:00pm–1:00pm: Break**

**2:10pm–3:10pm: Setting Boundaries and Being Present at Work**

- Led by Ashiya Swan, Nashville Freedom Schools
- When you're knee deep in human resources issues, overdue bills, and a CEO breathing down your neck, it may be difficult to set boundaries and remain present and mindful. This session will help you navigate tense office environments while maintaining your zen!

**3:30pm–4:00pm Wrap Up**

- We'll recap the retreat, talk about what's next, and conclude our time together!