The Summit 2027 Preliminary Agenda

February 7-10, 2027 | Kona Kai Resort | San Diego, CA

Sunday, February 7, 2027

12:00 – 4:00 p.m.	**Policy and Advocacy Committee Meeting** **Invitation Only** *La Jolla*
4:00 – 6:00 p.m.	**Registration Open** *Point Loma Foyer*
6:00 – 8:00 p.m.	**Welcome Reception** Join us! Reconnect with familiar faces and meet new friends while you enjoy drinks, hors d'oeuvres and the fellowship of your peers. *Cabo Garden & Courtyard*

Monday, February 8, 2027

7:00 – 8:30 a.m.	**Registration Open** *Point Loma Foyer*
7:30 – 8:30 a.m.	**Breakfast** *Cabo Garden & Courtyard* *(Weather Backup: Point Loma 3)*
8:30 – 9:15 a.m.	**Opening Devotion and Welcome** *Point Loma 1 & 2*

- **Alesia Frerichs**, President and CEO, Lutheran Services in America
- **Pastor Mark Huber**, Sanctuary Church

9:15 – 10:30 a.m. **Plenary: Designing Solutions for this Moment. And for What's Next.**

Strong leadership is grounded in long-term planning to plot several moves forward. To meet this moment and what's next, it requires a mindset shift and a willingness to act boldly. Taken together, strategic planning, human-centered design, and systems thinking, can offer an integrated framework to improve results now while building the capacity to meet tomorrow's challenges.

- **Nadia Roumani,** Senior Designer with Stanford d.school, and Co-founder of Stanford's Effective Philanthropy Learning Initiative

Point Loma 1 & 2

10:30 – 11:00 a.m. **Break**

Point Loma Terrace

11:00 – 12:00 p.m. **Plenary Panel Discussion: Now what? Reinventing Your Organization for Sustainable Impact**

CEOs are reinventing their organizations for long-term sustainability and impact. From adapting to changing realities, to sharpening strategic areas of focus, and pursuing bold initiatives, hear from your peers about how they have and continue to reimagine their unique value proposition to strengthen individuals and communities.

- **LaSharnda Beckwith, PhD,** President & CEO, Lutheran Social Services of Southern California; **Keith Jones,** President & CEO, AbleLight; **Adam Marles,** President & CEO, EverTrue; **Nadia Roumani** (moderator)

Point Loma 1 & 2

12:00 – 12:20 p.m. **Morning Wrap-up**

Point Loma 1 & 2

12:30 – 1:30p.m. **Networking Lunch**

Cabo Garden & Courtyard (Weather Backup: Point Loma 3)

1:45 – 3:00 p.m. **Catalyst Roundtable Breakout Sessions**

Health Through Housing: Turning Mission and Assets into Service-Enriched Housing Solutions

Across the Lutheran Services in America network, churches and social ministries are asking the same question: how can they address affordable housing with services to better meet the needs of individuals and communities through conversion of faith-based land assets? This CEO-level conversation moves past program mechanics to the key leadership decisions needed for progress: whether housing fits, the risks and capabilities needed, the role of organizational leadership, and assembling the right partners. Drawing on initial insights from our inaugural Health through Housing cohort, this conversation will explore how, bringing together shared capacity and investment can expand access to housing with services.

Coronado

Strengthening the Workforce for Today and Tomorrow
For many organizations, workforce is the single biggest barrier to growth. And the ability to hire 'more' people is elusive. With AI quickly changing how work gets done, as employee roles are shifting, while essential and needed skills are changing, hear from peer CEOs about how they are navigating the road ahead. Explore the strategies leaders are putting into practice —from leveraging emerging technologies to how they are listening to and engaging their existing workforce—to build the talent and capacity for today and tomorrow.

Point Loma 1 & 2

3:00 – 3:15 p.m. **Break**

Point Loma Terrace

3:15 – 4:30 p.m. **Policy Shifts and Positioning for What's Ahead**

Point Loma 1 & 2

4:30– 4:40 p.m. **Devotion and Wrap-up**

- **Pastor Mark Huber**, Sanctuary Church

4:40– 5:00 p.m. **Walking Alongside, Together**

This small group discussion, led by Pastor Mark Huber and Renada Johnson, will focus on redefining organizational leadership for today as we work to balance decision making and understanding. Join your peers to share your insights, challenges, and strategies.

6:00 – 6:30 p.m. **First-Time Attendee Welcome Reception**

Point Loma Terrace and Foyer

Sponsored by Portico Benefit Services and Mission Investment Fund.

6:30 – 7:00 p.m. **Evening Reception**

Point Loma Terrace

Sponsored by Portico Benefit Services and Mission Investment Fund.

7:00 – 9:00 p.m. **Group Dinner**

Join us for dinner, conversation, and celebration as we welcome CEOs new to the network and honor those who are preparing for retirement.

Point Loma 3

Tuesday, February 9, 2027

7:30 – 8:30 a.m. **Breakfast**

Cabo Garden & Courtyard

8:30 – 8:45 a.m. **Devotion**

- **Pastor Mark Huber**, Sanctuary Church

8:45 – 10:15 a.m. **Navigating Organizational Change for Stronger Impact**

The work of aligning systems, structures, and people around a new direction or “the messy middle” is key to advancing organizational change. Building on the foundation from Part 1 on Monday, this session will focus

on practical applications of how CEOs can lead their teams to ensuring the organizational reach, strategy, and revenue are aligned for impact.

- **Nadia Roumani,** Senior Designer with Stanford d.school, and Co-founder of Stanford's Effective Philanthropy Learning Initiative

Point Loma 1 & 2

10:15 – 10:45 a.m. **Break**

Point Loma Terrace

10:45 – 11:50 a.m. **NEW: The Exchange** The Exchange brings CEOs together for candid conversations as peers about bold leadership decisions that were difficult in the moment and transformative in hindsight.

Leading the Board when Stakes are High

At the moments that define an organization—rapid growth, a merger or acquisition, rightsizing, or uncertain funding—the CEO-board relationship can be an accelerant or an obstacle. Hear from CEOs who have led their boards through consequential change: how they engaged board members, strengthened trust, and harmonized differing viewpoints for a shared vision. Learn what works, lessons learned, and how CEOs can build a board that is ready to be a strategic partner when the stakes are highest.

Point Loma 1 & 2

Shaping Expertise into Enterprise

What if some of your organization's greatest assets are not necessarily on your balance sheet—and rather in what you know, do well, and/or have built? Join your fellow CEOs who have made their expertise a strategic advantage. We will explore how to move an idea to viable enterprise, what has been learned along the way—including pricing, investment, risk and staying true to mission.

Coronado

Noon – 1:30 p.m. **Annual Membership Meeting & Leadership Awards Luncheon**
Sponsored by Lutheran Church Extension Fund.

Point Loma 3

1:45 – 3:00 p.m. **Catalyst Roundtables Breakout Sessions**

From What Works to What Lasts: Real Solutions for Children and Families

What are the conditions, partnerships, and lived expertise that strengthen children and family practice? Through the Results Network, social ministries are developing forward-thinking approaches to ensuring families not only stay together, but can be set up for long-term health and well-being. We will explore how to ensure innovations lead to meaningful change in communities with a focus on emerging and evidence-informed solutions

Coronado

Centering Lived Experience to Inform Strategy, Policy, and Investment to Improve Outcomes for Older Adults

Although older adults and family caregivers are aging rapidly and the fastest growing population, many recent policy shifts are working against this trend. With growing workforce and resource challenges, the future of 'care' will need to look different. Older adults and family caregivers hold critical expertise about what works, where systems fall short, and what meaningful change can look like. And at the same time, with technology changing rapidly, what are the considerations to ensure access and efficacy of long-term care? This session will include CEOs perspectives on engaging people with lived experience amidst rapidly changing state and federal landscapes to shape lasting policy, practice, and systems changes.

Point Loma 1 & 2

3:00 – 3:15 p.m. **Break**

Point Loma Terrace

3:15 – 4:15 p.m. **Partners Panel**

Point Loma 1 & 2

4:15 – 4:30 p.m. **Wrap-up and Devotion**

- **Pastor Mark Huber**, Sanctuary Church

4:30 – 5:00 p.m. **One-on-One Walks**
New and experienced CEOs are matched together to discuss issues, share ideas and foster relationships.

5:00 – 6:30 p.m. **Portico Networking Reception**

Portico Benefit Services invites you to enjoy refreshments and conversation with friends and colleagues.

6:30 p.m. **Optional Networking Dinner**

Meet for a casual dinner and a chance to connect with friends old and new (participants cover their own meal costs).

Wednesday, February 10, 2027

7:30 – 8:30 a.m. **Breakfast**

Cabo Garden & Courtyard

8:30 – 8:45 a.m. **Devotion**

- **Pastor Mark Huber**, Sanctuary Church

8:45 – 10:15 a.m. **NEW: Innovation Lab – Design Thinking for Catalytic Growth**
You won't want to miss our *new Innovation Lab* where CEOs will apply the design frameworks explored earlier throughout the plenary series alongside their peers. In this interactive session, you will put innovation into practice to tackle real challenges as a network of peers.

10:30 a.m. – 12:00 p.m. **Innovation Lab: Peer Case Studies & Design Sprint**

Innovation takes many forms across our nationwide network — from bootstrap fixes that sustain daily operations to bold bets that disrupt an entire sector — and no single approach fits every organization. Hear directly from CEOs on how they fund, test, and scale new approaches within their own organizations. And then, put ideas into action alongside peer leaders working in similar service line(s) to explore new ideas and approaches to bring back to your organization.

Point Loma 1 & 2

12:00 – 1:30 p.m. **Closing Benediction & Lunch**

Join us for an informal lunch as the Summit draws to a close. Boxed lunches will be provided.

Cabo Garden & Courtyard