**WORKSHOPS**

**9:30 AM – 11:00 AM**

**FORM 990: TIPS & TRAPS FOR PROPER REPORTING & EXEMPTION RESTATEMENT**
Laurence Scot, MBA, CPA, Co-Founder and Co-Managing Partner, Skody Scot & Co. CPAs

**Description:** Form 990 is one of the most public and transparent of all returns. Unless allowed to file a simpler 990-EZ or 990-N, Form 990 must be filed completely and accurately each year by every exempt organizations or they can lose their exemption. This workshop will cover some of the more complex areas of the form and provide tips to avoid misreporting or being audited by the IRS. Also cover how to get your tax exemption restated after revocation.

**1:00 PM - 2:30 PM**

**RAISING PHILANTHROPIC SUPPORT**
Linda Franciscovich, Executive Director, The Grossman Family Foundation/Upshot Advisors LLC
Jane Englebardt, Principal, Upshot Advisors, LLC

**MORNING SESSION: 9:00AM – 12:00PM**

The following consultants are available at these times by appointment only:

- **9:15AM – 10:00AM**
  - BUDGET/FINANCE & ACCOUNTING
  - CAPACITY BUILDING

- **10:30AM – 11:15AM**
  - COMMUNICATIONS & MARKETING

- **11:15AM – 12:00PM**
  - FUNDRAISING

**INTERNATIONAL NGOs: ISSUES FOR WORKING IN NEW YORK**

**HUMAN RESOURCES – ORGANIZATIONAL DEVELOPMENT & STAFF TRAINING**

**LEADERSHIP TRANSITION/EXECUTIVE ROLE**

**LEGAL ISSUES – HOW TO START A NONPROFIT**

**PROGRAM EVALUATION AND OUTCOMES**

**USING SOCIAL MEDIA**

**STRATEGIC ALLIANCES, MERGERS & COLLABORATIONS**

**STRATEGIC PLANNING**

**THE ROLE OF THE BOARD IN GOVERNANCE & FUNDRAISING**

**AFTERNOON SESSION: 1:00PM – 4:00PM**

The following consultants are available at these times by appointment only:

- **1:00PM – 1:45PM**
  - BUDGET/FINANCE
  - FUNDRAISING AND RESOURCE MOBILIZATION

- **1:45PM – 2:30PM**
  - CORPORATE FUNDRAISING
  - FINANCIAL STRATEGY & COMMUNICATION
  - FOUNDATION GRANTS
  - MAJOR GIFTS
  - HUMAN RESOURCES – ORGANIZATIONAL DEVELOPMENT & EXECUTIVE COACHING
  - Navigating Organizational Change

- **2:30PM – 3:15PM**
  - PROGRAM EVALUATION & OUTCOMES
  - SOCIAL MEDIA
  - STRATEGIC PLANNING

- **3:15PM – 4:00PM**
  - THE ROLE OF THE BOARD IN GOVERNANCE & FUNDRAISING
  - TRENDS IN TECHNOLOGY
  - VOLUNTEER MANAGEMENT