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 tax 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

MAXIMIZING PHILANTHROPIC SUPPORT
Linda Franciscovich, Executive Director, The Grossman Family Foundation
Jane Englebardt, Principal, Upshot Advisors, LLC
Description: What is today’s philanthropic social investor mindset? What do you need to know, have ready, and do to get noticed? Then what? These questions and more are answered by seasoned professionals who have had experience and success on both sides — the giving and the getting — of philanthropic support.

MORNING SESSION: 9:15AM – 12:00PM

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

• 9:15AM – 10:00AM
  BUDGET/FINANCE & ACCOUNTING
  CAPACITY BUILDING
  COMMUNICATIONS BUILDING
  FOUNDATION GRANTS
  FUNDRAISING
  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
  THE ROLE OF THE BOARD IN GOVERNANCE & FUNDRAISING
  VOLUNTEER MANAGEMENT

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
  CORPORATE FUNDRAISING
  FINANCIAL STRATEGY & COMMUNICATION
  INTERNATIONAL NGOs: ISSUES FOR WORKING IN NEW YORK
  MAJOR GIFTS
  HUMAN RESOURCES – ORGANIZATIONAL DEVELOPMENT & EXECUTIVE COACHING
  NAVIGATING ORGANIZATIONAL CHANGE
  PROGRAM EVALUATION & OUTCOMES
  SOCIAL MEDIA
  STRATEGIC PLANNING
  THE ROLE OF THE BOARD IN GOVERNANCE & FUNDRAISING
  TRENDS IN TECHNOLOGY

• 2:30PM – 3:15PM
  Phil Gartenberg, President, Fulcrum Associates
  Bonnie Osinski, Fund Development Consultant, Osinski Development Resources
  Michael Feller, Distinguished Lecturer, Baruch College, School of Public Affairs
  Philip Rosenbloom, Founder and Principal, Tarn Consulting LLC
  Jillian Barsalou, Director of Major Gifts, Columbia University, Graduate School of Architecture, Planning and Preservation
  Janet Waterston, Consultant

• 3:15PM – 4:00PM
  Michael Seltzer, Distinguished Lecturer, Baruch College, School of Public Affairs
  Dan Williams, Associate Professor, Baruch College, School of Public Affairs
  Peter Levinson, President and Creative Director, LevinsonBlock, LLC
  Ed Semrier, Adjunct Professor, Baruch College, School of Public Affairs
  Michael Davidson, Board Coach, Nonprofit Management Services
  Fred Fields, Chief Operating Officer, Older Adults Technology Services (OATS)