

## 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 Englehardt, 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? What happens after you submit a request? 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 & MARKETING**

#### **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

• 1:45PM – 2:30PM

#### **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**

• 10:30AM – 11:15AM

• 11:15AM – 12:00PM

Dan Williams, Associate Professor, *Baruch College, School of Public Affairs*

Alfred Gill, Executive Director, *Neighborhood Housing Services of Staten Island*

Denise Patrick, Adjunct Lecturer, *Baruch College, Weissmann School of Arts and Science*

Mary Tufts, Deputy Director of Foundation Relations, *Baruch College*

Kathy Herre, Interim Development Director & Development Consultant, *Herre Consulting*

Fiona Kanagasigam, Consultant, *Community Resource Exchange (CRE)*

Wayne Ho, Chief Strategy and Program Officer Federation of Protestant Welfare Agencies

Sonia Jarvis, Esq., Distinguished Lecturer, *Baruch College, School of Public Affairs*

Shoba Nair, Associate Professor, *Baruch College, School of Public Affairs*

Harry Berberian, Senior Advisor for Communications and External Affairs, *Graham Windham*

Sandra A. Lamb, President and CEO, *Lamb Advisors LLC*

Hank Goldstein, Principal, *The Oram Group, Inc.*

Susan Chambre, Professor Sociology & Anthropology, *Baruch College*

• 2:30PM – 3:15PM

• 3:15PM – 4:00PM

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*

John Casey, Professor, *Baruch College, School of Public Affairs*

Jillian Barsalou, Director of Major Gifts, *Columbia University, Graduate School of Architecture, Planning and Preservation*

Janet Waterston, Consultant

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 Sermier, 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)*