Inland NW Nonprofit Conference - Leadership Series
2012 Registration Pamphlet

Mail-In Form

How it works

Classes are set-up to be purchased ala carte, or as entire day passes. Check only one class per session. For class descriptions, see page 2 of this pamphlet. **Be sure to take advantage of our day pass discounts - Additional attendees from same organization receive a 50% discount on day passes. Receive the early bird discount of 10% if you buy your day pass before January 1st.** This registration form is for those who intend to pay by check only. To pay by credit card, please visit our website at www.ae-consulting.net/Conference.htm.

Step 1: Select from pricing options

- ☐ Ala carte ($45 per class, $55 for Funders Panel)
- ☐ Day pass ($170, includes 4 classes and lunch)
- ☐ Day pass w/ additional attendees ($85 x ______ (# of) attendee(s), includes 4 classes and lunch)
- ☐ Lunch ($15, vegetarian option available)

Step 2: Choose your classes

1st session (8 - 9:15am)

- ☐ Grants Research & Prospecting (Mark Pond, Spokane Public Library)
- ☐ Human Capital Management (Adam Borgman, DOVIA, and Pam DeCounter, Red & Associates)
- ☐ Endowments and Planned Giving 101 (PJ Watters, Inland NW Community Foundation)

2nd session (9:30 - 11:30am)

- ☐ Funders Panel (Panelists To Date: Brian Myers, Empire Health Foundation, Jerrie Allard, City of Spokane, Lori Moloney, Women Helping Women Fund, PJ Watters, Inland NW Community Foundation)
- ☐ Succession Planning (Jason Swain, Jason Swain & Associates, LLC, and Diane Quincy)

Keynote Lunch Speaker: Deanna Davis – topic TBD (11:45am - 1pm)

3rd session (1:10 - 2:30pm)

- ☐ The Science and Art of Grant Writing (Katie Howard, KH Consulting)
- ☐ Strategic Planning (Dave Heyamoto, SNAP)
- ☐ Financial Management 101 (Angela Richardson, CliftonLarsonAllen)

4th session (2:45 - 4pm)

- ☐ Marketing in the Tech Era (Ed and Tine Reese)
- ☐ Board Management and Development (for Executive Management) (Don Chalmers, Sparrowhawk Consulting)
- ☐ The Uber Board Member: Adopting a Model for Guiding Your Organization (for Board Members) (John Ferrone, Ferrone Associates Consulting)

Step 3: Your information

Full Name: ____________________ Organization: ____________________ Email: ____________________

Phone: ____________________ Address: ______________________________

- ☐ Vegetarian lunch option?

Step 4: Payment

Please calculate your total and mail your check and this form to the address below. Be sure to indicate below if you would like a receipt mailed to you.

- ☐ Receipt?

Mail check and form to:
AE Consulting, LLC
11003 E. Valleyway
Spokane Valley, WA 99206

Class Descriptions

When: February 16, 2012, Check-in 7:30 am
Where: Spokane Masonic Center
1108 W. Riverside Ave. (Parking on Main Ave.)

1st session (8-9:15am)

***Grants Research & Prospecting (Mark Pond, Spokane Public Library)**

Back by popular demand! Learn about grant-seeking resources available to you through the Spokane Public Libraries. Review how to access and utilize the Foundation Center's Foundation Directory Online to source leads from private and corporate foundations, and touch on sourcing government grants. Learn techniques and strategies behind researching and prospecting and how to make use of tracking tools to expedite your overall search. We'll hear from an experienced grant writer as well.

Human Capital Management (Adam Borgman, DOVIA, and Pam DeCounter, Red & Associates)

Learn to increase the performance capacity of your organization by harnessing the power of your organization's greatest assets: your staff, both paid and volunteer. Join this workshop to learn about the benefits of investing in recruiting, training, and retention,
and review best practices that can offer highly valuable changes immediately and for future sustainability.

Endowments and Planned Giving 101 (PJ Watters, Inland NW Community Foundation)

Learn the macro-level details of endowments: What is an endowment? How do you know when you are ready to establish one? What is your Board's fiduciary responsibility? Who manages the investments and what is a good "asset allocation"? How do you determine your spending policy? What are the best ways to build your endowment? You'll also learn more details about a local resource, the Inland Northwest Community Foundation, and how they can support you in this effort.

2nd session (9:30-11:30am)

Funders Panel (Panelists: Brian Myers, Empire Health Foundation, Jerrie Allard, City of Spokane, Lori Moloney, Women Helping Women, PJ Watters, Inland NW Community Foundation)

Various local and regional organization representatives will participate in an open forum discussion covering their funding process and priorities.

Succession Planning (Jason Swain, Jason Swain & Associates, LLC, and Diane Quincy)

Nonprofits rely strongly on management to achieve mission success. Succession planning is more important than ever as our baby boomers retire. During this class, participants will explore options for planning and transitioning management whether it's occurring now or in 10 years.

Keynote Lunch Speaker: Deanna Davis – topic TBD (11:45am-1pm)

3rd session (1:10-2:30pm)

The Science and Art of Grant Writing (Katie Howard, KH Consulting)

The process of developing a strong, compliant grant proposal can often seem like an uncertain venture that can leave us feeling overwhelmed and confused. The purpose of this class is to demystify the grant proposal process. We'll review the proposal lifecycle, from research to submission, and explore common mistakes people make and how to avoid them. We'll also examine short excerpts from winning proposals. This class is especially intended for people new to the grant writing arena, people who have struggled to win grants in the past, and people who feel timid about writing.

***Strategic Planning (Dave Heyamoto, SNAP)**

You may not pay certain taxes, but that doesn't mean you're not a business. Join this workshop to review the importance of forecasting, projecting, planning, and a variety of other activities that are just as applicable to nonprofit organizations as for-profit businesses. Learn strategies and tactics for envisioning, planning, and executing a long-range strategic plan to achieve impact.

***Financial Management 101 (Angela Richardson, CliftonLarsonAllen)**

Back by popular demand!! During this class, we'll review basic principles for financial management of nonprofit organizations, including best accounting practices, challenges facing smaller nonprofits, trends within the industry, and benchmarking tools to help manage the organization and make good business decisions.

4th session (2:45-4pm)

Marketing in the Tech Era (Ed and Tine Reese)

Learn the nitty-gritty of the ever-changing social media landscape and the multiple tools available. This workshop will help you identify what's best for what activity and how to create a plan to engage an audience and offer content that cuts through the noise to reach your community, service population, and donors.

***Board Management and Development (for Executive Management) (Don Chalmers, Sparrowhawk Consulting)**

Board members are not required to know everything about nonprofit management, but they are expected to act prudently and in the best interests of the organization. Is your board doing this optimally? This workshop will discuss how to cultivate active not passive board members who are truly engaged in meeting your mission but not managing the organization.

The Uber Board Member: Adopting a Model for Guiding Your Organization (for Board Members) (John Ferrone, Ferrone Associates Consulting)

This Board Development workshop introduces Board Members to the use of a model for providing guidance through leadership and accountability oversight to nonprofit organizations. It will answer this key question: When I show up to a Board meeting, how can I get my arms around all that is going on—both programmatically and operationally—so that I can participate as an engaged Board member, and help the organization become and remain sustainable? This workshop is not Finance or Accounting 101, or Bylaws 101, or any type of 101.

The classes that are marked with (*) are highly recommended for young organizations or those new to the nonprofit sector. This is NOT a requirement, merely a guidance tool.