

Nonprofit Organization New Board Member Training

Have you recently joined the board of a nonprofit organization? Did you assume this role without adequate knowledge, training and understanding of the position's expectations?

Our popular new board member training is designed to clarify the responsibilities and strengthen the abilities of new board members.

**Saturday, February 25, 2012
9:00 am to 3:00 pm**

**University Place Hotel & Conference Center
Portland State University
310 SW Lincoln Street
Portland, Oregon**

Our instructors will cover these topics:

- **Board Member Rights and Responsibilities**

*Kirk Harvey, Chief Investigator
Oregon Department of Justice
Charitable Activities Section*

- **Board Governance**

*Cynthia Cumfer
Attorney*

- **Understanding Financial Information**

*Kay Sohl
Kay Sohl Consulting*

- **Meeting Intangibles**

*Arty Trost
Organizational Consultant*

- **Facilitator**

*Linda Golaszewski
Institute for Nonprofit Management
Portland State University*



**Brought to you by:
Financial Stewardship Resources, Inc.**
P.O. Box 1600
119 S. 16th Street
Philomath, OR 97370

www.financialsteward.org
FSR is a 501(c)(3) organization

What is Financial Stewardship Resources?

Financial Stewardship Resources, Inc. (FSR) is a 501(c)(3) nonprofit organization that educates and empowers nonprofit board members in sound financial, administrative and organizational stewardship.

Often nonprofit organizations provide little or no training for new and/or existing board members. Since time and money are frequently scarce, board members often focus on the provision of services and related fund-raising.

FSR fills this gap by providing basic board training throughout Oregon. This involves practical training in legal, financial and leadership topics. Our training helps board members to better understand their roles and manage their organizations effectively.

2012 Schedule of Training Events

8th Annual Statewide Nonprofit Organization Board Training

Saturday, January 21, 2012
LaSells Stewart Center
Corvallis, Oregon

Oregon Coast Nonprofit Organization Board Training

Spring 2012

Central Oregon Nonprofit Organization Board Training

Saturday, May 5, 2012
Eagle Crest Resort
Redmond, Oregon

Southern Oregon Nonprofit Organization Board Training

Fall 2012

Eastern Oregon Nonprofit Organization Board Training

Saturday, October 13, 2012
Pendleton Convention Center
Pendleton, OR

President/President-Elect Training

Fall 2012
Independence Event Center
Independence, OR

Please check our website throughout the year for more details on these events. Additional board training will be held during the year by request from communities. If you feel FSR could benefit nonprofit organizations in your community, please contact us.

Agenda

8:15 am - 9:00 am Registration and Refreshments

Joining a new board can be exhilarating and intimidating. These workshops are designed to help you approach your board service with confidence. What is expected of you as a board member depends on whether your board has delegated some or most of its management responsibilities to a paid or volunteer Executive Director (or someone else charged with the management of the organization, no matter what they are called). To make these workshops most useful to your needs, we offer a track for each type of nonprofit board management.

9:00 am Board Member Rights and Responsibilities

Kirk Harvey (Entire Group)

This session will explore the legal duties, rights and responsibilities of volunteer board members in governing charitable and other nonprofit organizations under Oregon law.

Governance and Financial Oversight

Track One No Executive Director

Governance - Cynthia Cumfer

This practical workshop will walk you through what you as the board member of a small nonprofit are expected to do to manage your organization and how you do it. We cover long-term planning and your duties of day-to-day management and oversight of what others are doing. We'll look at the nuts-and-bolts of how you get the information you need and the process your board should follow to make good decisions.

Track Two With Executive Director

Financial Oversight - Kay Sohl

Larger organization's often have complex financial systems that can confound board members. This workshop will explore strategies to help your board identify the financial information you need to:

- 1) Understand your nonprofit's financial health
- 2) Make wise financial choices
- 3) Spot red flags and promptly deal with problems

Lunch

Lunch

Financial Oversight - Kay Sohl

Boards in smaller organizations do not have financially-sophisticated staff to help the board with the organization's finances. In this workshop, we'll look at how your board can set up a responsible financial system to:

- 1) Get the financial information you need to protect your resources
- 2) Understand your organization's financial picture
- 3) Evaluate financial choices

Governance - Cynthia Cumfer

If your organization has an executive director, you are participating in a board that has delegated some or all of its duties to manage the corporation. This practical workshop helps you understand your responsibility for what the board did not delegate and how you oversee what the board did delegate. We'll walk step-by-step through the process of how you get the information you need to make decisions and exercise oversight.

Meeting Intangibles

Arty Trost (Entire Group)

All boards bring together a range of views and experiences. What are the characteristics of a successful board? How important is its culture? This session will help you clarify what your role is in helping the board work together effectively.

2:45 Questions and Answers Linda Golaszewski, facilitator

Our Instructors

Kirk Harvey, Chief Investigator, Oregon Department of Justice

Kirk is the Chief Investigator for the Charitable Activities Section of the Oregon Department of Justice. He is a Certified Fraud Examiner with 32 years experience in governmental regulation and law enforcement. Prior to his appointment to Chief Investigator, Kirk served as an Investigative Auditor for the Charitable Activities Section of the Department of Justice.

Cynthia Cumfer, Attorney at Law

Cindy maintains a private law practice in Portland, working exclusively with nonprofit organizations around the state. She is the co-author of The Oregon Nonprofit Corporation Handbook and taught Nonprofit Law at Lewis & Clark Law School. She received the Oregon State Bar President's Membership Service Award for her educational workshops for lawyers and has presented over one hundred workshops on nonprofit topics to board members, staff, volunteers and professionals including many for FSR.

Kay Sohl, Nonprofit Consultant, Kay Sohl Consulting

Kay has provided training and consultation to boards of directors and Executive Directors of over 5,000 not-for-profit organizations throughout the United States. Her work is focused on financial management, board leadership, and financial strategies for community based nonprofits. She is co-author of the Oregon Nonprofit Corporation Handbook, a comprehensive guide to legal, financial, governance, and management issues for community-based nonprofits, now in its 4th edition.

Arty Trost, Organizational Consultant & Professional Speaker

Arty has been keeping audiences enthralled for over 25 years. She is known for the high level of energy and enthusiasm she brings to her work, as well as her ability to stimulate and motivate participants. Her extensive consulting experience provides a rich resource for participants. Her clients range from Fortune 500 corporations to public agencies to small grass-roots community organizations. Arty has presented workshops, seminars and institutes throughout the United States, as well as keynoting national, regional and state conferences.

Linda Golaszewski, Program Manager, Institute for Nonprofit Management, PSU

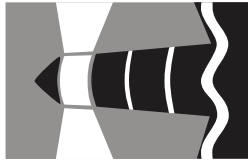
As a Portland State University faculty member, Linda teaches classes on the governance of nonprofit organizations as well as the management of new, small and grassroots nonprofits. Her interests also include leadership transitions and emerging organizations.

Reminder: Discount for early registration ends on February 10th



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Register Online at
www.financialsteward.org

or mail in this form

Nonprofit Organization New Board Member Training Registration

Organization: _____
 Your name (contact person): _____
 Street Address: _____
 City: _____ State: _____ Zip: _____
 Phone: _____ Email: _____
 Attendee's Name Email Address Address City State Zip
Jane Doe *janedoe@gmail.com* *1515 Doe Street* *Janeville* *Oregon* *97000*

Does your organization have an executive director (please circle)? YES NO
 What is the size of your organization's annual budget (please circle)? Less than \$ 75,000 \$ 75,001-150,000 \$ 150,001-300,000 \$ 300,001-500,000 \$ 500,000 – 2,000,000 More than \$ 2,000,000
 I don't know the size of our budget

CPE credit available for accountants: Sign in at Accountant Desk after picking up your registration packet.

Payment

Until Feb. 10th:
 Total Attending _____ x \$65.00 = _____
 After Feb. 10th:
 Total Attending _____ x \$80.00 = _____

Total Enclosed _____

Lunch will be included, please indicate lunch choices:
 How many standard? _____
 How many vegetarian? _____
 How many gluten-free? _____

Return completed form and check payable to:
Financial Stewardship Resources, Inc.
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Payment is nonrefundable; Substitutions allowed for this event

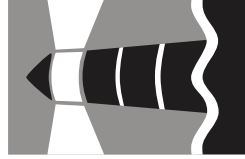
**This event is made possible by the
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Spirit Mountain Community Fund

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To: The President of the Board of: