

Nonprofit Organization Board Officer Team Training

Are you a board officer who assumed this role without adequate knowledge, training or understanding of the position's expectations? Could your board's executive team (President, Secretary and Treasurer) be strengthened by financial and organizational management team building?

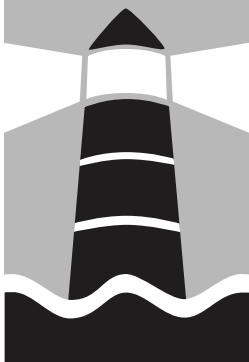
**Saturday, September 19, 2009
9:00 am to 3:30 pm**

**Florence Events Center
715 Quince Street
Florence, Oregon**

Join some of the best nonprofit advisors in the state for a special opportunity to strengthen your board officer team. This pilot event is limited to 25 organizations. Attendees will receive a personal experience and participate in customized training specifically designed for board officer teams.

Who Should Attend?

- **Your President, Secretary and Treasurer**
- **Your President-Elect, Secretary-Elect, and Treasurer-Elect**
- **Or all six**



**Brought to you by:
Financial Stewardship Resources, Inc.**

P.O. Box 1600
119 S. 16th Street
Philomath, OR 97370
(541) 929-9320

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

Event Schedule

To achieve a quality board officer team training experience,
all three board officers and/or officers-elect must participate!

8:15 am – 9:00	Registration and refreshments
9:00 am – 9:50	Welcome and Opening Session “Effective Board Governance – The IRS is Taking a Stand” Presented by: Joe Kroll, IRS Most of the major changes to the new IRS Form 990 relate to board governance. The IRS is clearly signaling what activities it feels constitute good board governance. This opening session will help you understand the nature of these activities and why the IRS feels they are so important. Joe Kroll is a popular Internal Revenue Service speaker based in San Francisco, CA., where he serves as Exempt Organization Audit Manager. As such, he manages employees who conduct examinations of tax exempt organizations with charitable, scientific, religious, literary, educational, civic, labor, agricultural, social and fraternal programs.
9:50 am – 10:00	Break
10:00 am – 12:00	Officer Training President / President-Elect: Kirk Harvey & Heidi Henry Secretary/ Secretary-Elect: Ross Laybourn & David Atkin Treasurer / Treasurer-Elect: Joe Kroll & Katherine DeYoung
12:00 pm – 12:45	Lunch and Networking Lunch is provided as part of your registration.
12:45 pm – 1:45	Sharing Information – Sharing the Load Although it is good for each of your board officers to be aware of their own job descriptions, it is even better when they are able to support each other. During this session you will learn ways that officers can lighten each others load and strengthen the organization.
1:45 pm – 2:00	Break
2:00 pm - 3:30	Building Your Officer Team , Meredith Howell Andrew Carnegie said, “Teamwork is the ability to work together toward a common vision. The ability to direct individual accomplishments toward organizational objectives. It is the fuel that allows common people to attain uncommon results.” Activities and discussion in this session will help board officers to define common organizational goals and reach consensus. Board officers will also learn how to more fully enjoy the process of shared leadership which maximizes board effectiveness.

Discount for Early Registration Ends August 31, 2009!

Our Instructors

Joe Kroll, Audit Manager, Internal Revenue Service – Tax Exempt Division
(See professional synopsis in left panel)

Ross Laybourn, Former Assistant Attorney General, Oregon Department of Justice
Ross Laybourn was Assistant Attorney General in Oregon for 30 years. He served as Attorney-In-Charge of the Oregon Department of Justice Charitable Activities Section from its formation until 2005.

Kirk Harvey, Chief Investigator, Oregon Department of Justice
Kirk Harvey is the chief investigator for the Charitable Activities Section of the Oregon Department of Justice. He is a Certified Fraud Examiner with over 30 years experience in law enforcement and regulation.

Heidi Henry, Board Trainer and Organizational Planner, Banner Non-Profits, LLC
Heidi has worked in the nonprofit industry for over 18 years. She currently works across the northwest region as a consultant presenting board training, strategic planning and community development training programs.

David Atkin, Director, Nonprofit Support Services
As an attorney, David works with nonprofit organizations in the United States and international locations such as Asia and Latin America. He regularly presents educational programs on nonprofit law for charitable organizations, political organizations and churches.

Meredith Howell, PhD, Nonprofit Consultant
Meredith assists small and mid-sized nonprofits and schools across Oregon to build sustainable programming and help match funding resources to program ideas. Her strengths include training, grant writing, strategic planning, budgeting, along with project and program evaluation.

Katherine DeYoung, Executive Director & CPA, Financial Stewardship Resources, Inc.
Kathy is the founder of Financial Stewardship Resources, Inc. and co-author of "A Directors and Officers Workbook" for nonprofits. She has worked with nonprofit organizations for over 30 years and is a frequent presenter on nonprofit financial issues.

Other Upcoming FSR Events -- Check our website for more information

Southern Oregon Nonprofit Organization Board Training -- Roseburg, OR

Saturday, October 24, 2009
More than 15 workshops on key topics presented by accountants, attorneys, university faculty, nonprofit consultants and leaders from the IRS and Oregon Department of Justice.

Central/Eastern Nonprofit Organization Board Training – Redmond, OR

Saturday, November 7, 2009
This regional training focuses on Oregon governing board responsibilities, understanding and using financial information, nonprofit legal documents and how to ignite board leadership.

Writing Policies – Writing a "Conflict of Interest Policy"

- Thursday October 15, 2009 - Willsonville, OR
- Monday November 16, 2009 - Corvallis, OR

6th Annual Nonprofit Organization Board Training – Corvallis, OR

Saturday, January 23, 2010



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Behind the Scenes

It took a “village” to create this pilot program!

Other leaders sharing their knowledge, talent and skills to make this a special event include:

Flaxen Conway, Professor, Oregon State University Department of Sociology

As an Oregon Sea Grant Extension faculty member at OSU, Flaxen works with coastal and other nonprofit organizations, communities and families who are affected by changes in natural resource policy and management. Her educational outreach programs help people and organizations to creatively manage change by understanding their present situation and future options for growth and development.

Linda Golaszewski, Director, Institute for Nonprofit Management, Portland State University

As a PSU faculty member, Linda stays on her toes in the nonprofit world through teaching, consulting and working with nonprofits. Her interests are board governance, leadership transitions and emerging organizations.

Heather L. Weigler, Assistant Attorney General, Oregon Department of Justice

Heather Weigler is an Assistant Attorney General for the Oregon Department of Justice, Charitable Activities Section. She also serves on several nonprofit boards, including serving as the Secretary of Oregon Women Lawyers, the third largest bar association in the state.

Doug Boysen, Vice-President & General Counsel, Samaritan Health Services, Inc.

Doug manages the legal affairs for a nonprofit health system based in Corvallis. He regularly advises his clients regarding tax-exemption regulatory compliance and board governance issues. Doug is also Adjunct Faculty in Pacific University's Masters of Healthcare Administration.

Adrienne Graham, Nonprofit Consultant, Leapfrog Training & Facilitation

Adrienne specializes in the design and delivery of training and facilitation programs for nonprofits, businesses and community organization. She brings a wealth of experience to share with you, not only providing training for over 10 years but also as an executive director of a nonprofit for 12 years.

Janet Magedanz, CPA & Managing Partner, Anderson Group, CPA's, LLC

Janet is senior managing partner of one of the largest accounting firms in the Corvallis area. She has been in public accounting for over 25 years working with many nonprofit organizations and giving presentations on financial information in an easily understandable way.

Thomas A. “Tad” Davies, MBA, CPA, CFE, The Davies Group

Tad spent the first 12 years of his career as an IRS Revenue Agent in Salem. Since then he has been in public practice in Albany and has spent time as a senior tax manager, partner and owner of his own firm. Along with his MBA from OSU his experience has covered 37 years of advising businesses and nonprofits on operations and compliance.

Hotel Accommodations

Special lodging rates for this event are available from:

Driftwood Shores Resort
88416 1st Avenue
Florence, Oregon
(800) 422-5091

Room rates are \$79 plus tax (single queen bed) or \$121 plus tax (double queen beds) per day, until September 10 or the room block is full.



Register Online at
www.financialsteward.org
 Receive online confirmation of your registration

or mail in this form
Nonprofit Organization Registration Form

This event is limited to 25 organizations - register early! Registrations are processed on a first-come basis.

Organization: _____
 Your name (contact person): _____
 Street Address: _____ City: _____ State: _____ Zip: _____
 Phone: _____ Email: _____

Individuals Attending

_____	_____
_____	_____
_____	_____

Required

_____	_____
_____	_____
_____	_____

Optional

_____	_____
_____	_____
_____	_____

Attendee's Name

Attendee's Email Address

Payment

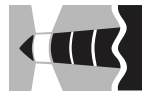
This registration fee is for your organization's delegation attending the event.

Until August 31st: _____ x \$300.00 = _____
 After August 31st: _____ x \$350.00 = _____
Total Enclosed \$ _____

If members of your delegation prefer a vegetarian lunch, please indicate the number here _____

Return completed form and check payable to:
 Financial Stewardship Resources, Inc.
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Payment is nonrefundable. If you find you need to cancel, please check with us to see if we have organizations on a waiting list. If so, you will only be charged a \$30 cancellation fee.



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To: The President of the Board

**This event is made possible by the
generous support of these
organizations:**

The Ford Family Foundation

The Oregon Community Foundation

Financial Stewardship Resources, Inc.

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

