

# 2011 Nonprofit Learning Series



**In the Spirit of "Looking Forward. Giving Back" Montgomery County Community Foundation presents this learning series, in conjunction with the Putnam County Community Foundation, to serve as a tool to strengthen our local nonprofit organizations.**

A series of 8 Workshops (described on the following pages) will be held with the first four in Greencastle and the last four in Crawfordsville. Montgomery County is welcome at Greencastle and vice versa.

PCCF Workshops are held at The Inn at Depauw, 2 W. Seminary St., Greencastle, IN  
MCCF Workshops are held at the Country Club, 3272 W. County Club Rd., Crawfordsville, IN

- February 28 – What YOU Bring to the Table: Assessing Yourself, Board and Staff**
- March 28 – The Top Twelve in Good Governance**
- April 25 – Creating a Realistic Development Plan for your Nonprofit Organization**
- May 23 – Strategic Planning**
- June 27 – Mission Focused Event Planning**
- August 22 – Planned Giving**
- September 26 – Financial Accountability**
- October 24 – Dashboard Reporting: Building and Using an Organizational Dashboard to Focus and Track Organizational Performance**

**TIME:** Each session is 11:00 a.m. to 2:00 p.m. and includes lunch  
**Cost:** \$100.00 for the entire series if signed up by Feb. 21<sup>st</sup>  
**\$15.00** for a single session if registered at least one week in advance  
**\$25.00** for a single session if registered less than one week in advance

**To Register:**  
Fill out the attached form and return it,  
along with payment to:  
Montgomery County Community Foundation  
P.O. Box 334  
119 E. Main St.  
Crawfordsville, IN 47933



# at Greencastle...



Wendell  
Seaborne

## February 28th - What YOU Bring to the Table: Assessing Yourself, Board and Staff

Speaker: Wendell Seaborne, Seaborne Leadership

*This highly-interactive seminar leads staff, volunteers and board to a greater understanding of their role and how to accomplish their dream of making a real difference in the lives of others. This workshop will lead participants through a series of personal and organizational assessments to identify strengths and opportunities for greater nonprofit service and intrinsic fulfillment. Embracing regular evaluations as part of the evaluation process helps to reaffirm the board's contributions to the organization. It can also highlight areas where each director, the board as a whole, or the organization should improve – thus establishing a plan of action.*



Dave  
Sternberg

## March 28th – The Top Twelve in Good Governance

Presenter: Dave Sternberg, Loring, Sternberg, and Associates

*Exceptional boards add significant value to their organizations. How does a board rise to this level? Are there standards that describe this height of performance? There are! These 12 principles of governance can transform your board (based on the *The Source* by BoardSource). Learn them, how to use them and become an exceptional board.*



Laura  
Edwards

## April 25th – Creating a Realistic Development Plan for your Nonprofit Org.

Presenter: Laura Edwards, Purdue School of Mechanical Engineering

*With the multitude of media and information available to nonprofits on fundraising advice, organizations can be more overwhelmed than ever on deciding where to begin. Whether you are new to fundraising, or have experience in the field and are seeking a fresh approach to planning for your resource development endeavors, presenter Laura Edwards, Director of Development from Purdue University will focus on practical strategies and tactical steps for creating a viable fundraising plan for your organization. Discussions will include setting monetary and donor engagement goals, planning various fundraising approaches, using SMART strategies and objectives for measurable success, as well as touching on how incorporating annual appeals, major gifts, and planned gift opportunities into your plan.*



Mike  
Stone

## May 23rd – Strategic Planning

Presenter: Mike Stone, Impact Strategies

*A strategic plan is only as good as the thinking behind it. In other words, how an organization arrives at its strategic priorities matters as much as what those priorities are. In this workshop, we will address three basic questions: 1) what, exactly, is strategy? How do you decide what is of strategic significance to an organization? How do you make strategy "stick" once it is developed? Case study examples and planning tools will be provided.*

# at Crawfordsville....



June  
Miller

## June 27th – Mission Focused Event Planning

Presenter: June Miller, Indiana Nonprofit Resource Network

*This fast paced and interactive workshop will give you ideas and tools that you can begin using immediately to achieve the goals you set for your next special event. But first, we will take a critical look at the advantages of planning special events and how these events can support the mission of your organization. Who should attend: Executive directors and staff involved in event planning and/or fundraising; board members and other volunteers; event sponsors; anyone interested in learning more about event planning*



Phil  
Purcell

## August 22nd – Planned Giving

Presenter: Phil Purcell, Ball State Foundation

*This interactive workshop will explain the most important tools and techniques of planned giving such as gifts of stock or land, bequests, life insurance, endowments - and more. Special attention will be given to share ideas that you can incorporate into an already busy schedule! Specific topics will include the role of your board to assure success, low budget marketing ideas that work and important policies and procedures. Please bring your questions too!*



Miriam  
Robeson

## September 26th – Financial Accountability

Presenter: Miriam Robeson, Attorney at Law

*In a tough economy and in the face of increased reports of fraud targeted toward nonprofit corporations, nonprofits are facing higher scrutiny for financial accountability to both the public and to funders (donors, granting organizations and the government). Nonprofits must become comfortable with tighter accounting practices in order to make best use of shrinking income and to prevent fraud. This program presents a dual focus to address today's financial accountability concerns:*

- (1) A discussion of the minimum requirements for understanding nonprofit finances in order to maximize mission delivery in a climate of increased costs and static (or declining) income and*
- (2) Information and tools for securing both cash and physical assets against loss and fraud.*



Bryan  
Orander

## October 24th – Dashboard Reporting: *Building and Using an Organizational Dashboard to Focus and Track Organizational Performance*

Presenter: Bryan Orander, Charitable Advisors

*Do we measure what's important, or do we make important what we measure? Nonprofits have been attempting to create workable "dashboards" for years. Dashboards should start at the staff level and then flow up to the board. See how you can implement a new format developed through a 3 year project with 10 smaller nonprofits by CompassPoint in the San Francisco area. Intended Audience: Executive Directors, Senior Staff, and Board members. Learning Outcomes: Attendees will have a good overall concept plus great handouts and on-line resources to explore assembling their own organizational dashboards.*



# 2011 NON-PROFIT LEARNING SERIES REGISTRATION FORM



**COST:** \$25 per person per workshop

## SAVE!

**SAVE** by registering for the entire series of eight workshops (Feb. 21 deadline): \$100.00

**SAVE** by registering early (one week in advance): \$15.00 per person per workshop

_____	_____
Last Name	First Name
_____	_____
Organization Name	Position/Title
_____	_____
Address 1	Address 2
_____	_____
City	State ZIP
_____	_____
Phone	Email

### TO REGISTER:

Please put a checkmark by the workshop(s) you wish to register for and then mail or deliver this form along with your check to:

Montgomery County Community Foundation  
Attn: Paula Reed  
119 E Main  
Crawfordsville, IN 47933

### GREENCASTLE WORKSHOPS

The Inn at DePauw  
2 West Seminary Street  
Greencastle IN 46135

### CRAWFORDSVILLE WORKSHOPS

Crawfordsville Country Club  
3272 W Country Club Rd  
Crawfordsville IN 47933

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| <input type="checkbox"/> <b>February 28, 2011</b><br>What YOU Bring to the Table: Assessing Yourself, Your Board and Your Staff<br>Wendell Seaborne | <input type="checkbox"/> <b>June 27, 2011</b><br>Mission-Focused Event Planning<br>June Miller                 |
| <input type="checkbox"/> <b>March 28, 2011</b><br>The Top Twelve in Good Governance<br>Dave Sternberg   | <input type="checkbox"/> <b>August 22, 2011</b><br>Planned Giving<br>Phil Purcell                              |
| <input type="checkbox"/> <b>April 25, 2011</b><br>Creating a Realistic Fundraising Plan<br>Laura Edwards  | <input type="checkbox"/> <b>September 26, 2011</b><br>Financial Accountability<br>Miriam Robeson               |
| <input type="checkbox"/> <b>May 23, 2011</b><br>Strategic Planning<br>Mike Stone  | <input type="checkbox"/> <b>October 24, 2011</b><br>Dashboard Reporting: Tracking Performance<br>Bryan Orander |