



INSTITUTE FOR BOARD TRUSTEES

Saturday, September 28, 2019

WCU's Business & Public Management Building
50 Sharpless St., West Chester, PA 19383

8:30 Check-In/Nametags... 1st Floor Lobby A Coffee, Meet/Greet, Info Tables ... Room 101

9:00 Opening Plenary...Room 101

Welcome/In Boards We Trust: Fiduciaries & Stewards

Anthony Morris, Esq, Board Chair & Karen Simmons, President/CEO, ChesCo Comm Fdtn

9:15-10:10 Workshop Sessions, Round #1

What's Our Plan? (H#1)	Krystine Sipple, CFRE	Rm 110
How Do We Enhance Board Impact as Ambassadors & Advocates? (H#2)	Donna Melton	Rm112
What Do Donors Look for in Nonprofit Financials? (H#3)	Louise Schorn Smith, CPA Beth Harper Briglia, CPA, CAP	Rm 116

10:20-11:15 Workshop Sessions, Round #2

How Can Boards Steward Excellent Outcomes? (H#4)	Noel Stanek Robert Stanek	Rm 110
How Can We Strengthen Our Fundraising? (H#5)	Constance Carter, CFRE Corrine Sylvia, CRFE	Rm 112
What Does Every Board Member Need to Know About Audits, IRS 990s & Internal Controls? (H#6)	Cindy Ray, CPA Kathleen Wileczek, CPA	Rm 116

11:25-12:15 Workshop Sessions, Round #3

How Can Boards Secure a Nonprofit's Future with Planned Gifts? (H#7)	Beth Harper Briglia, CPA, CAP Winnie Sebastian, Esq. Anthony Morris, Esq.	Rm 110
What are the Ways to Find & Recruit Board Members? (H#8)	Sonia Stamm	Rm 112
How Can Board Members Avoid Legal Issues? (H#9)	Peter Temple, Esq. Donald Lynn, Esq.	Rm 116

12:15-12:30 Break to Select Your Boxed Lunch @ Room 101

12:30-1:30 Working Lunch Panel Discussions, Round #4

What Are Lessons Learned from Board Officers? (H#10)	Matthew Holliday Michael Horak, CFA Peter Temple, Esq. Karen Simmons, Moderator	Rm 110
How Do Advisors Open Doors to Major & Planned Gifts? (H#11)	Donald Lynn, Esq. Louis N. Teti, Esq. Denise A. Wine, Financial Advisor Beth Harper Briglia, CPA, CAP, Moderator	Rm 112
How Can Boards Foster Partnerships & Collaborations? (H#12)	Tamara Fox, ChesPenn Services Gary Liddick, North Star of Chester County Kelly Raggazino, Open Hearth Connie Carter & Corrine Sylvia, Moderators	Rm 116