

# BOARD OF DIRECTORS INSTITUTE

Saturday, 10.08.22

Chester County Intermediate Unit, 455 Boot Road, Downingtown PA 19335

8:30 Check-In/Nametags ... 4<sup>th</sup> Floor Lobby Coffee, Meet/Greet, Info Tables ... Room 400/401

9:00 Opening Plenary: Welcome/In Boards We Trust: Fiduciaries & Stewards ... Room 400/401

Winnie Moran Sebastian Esq., Board Chair & Karen Simmons, President/CEO, ChesCo Comm Fdtn



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

Basic <b>Board Responsibilities</b> (H#1)	Lou Beccaria, Ph.D. Connie Carter, CFRE	Rm 300 v
<b>High Impact Boards</b> (H#2)	Corrine Sylvia, CFRE	Rm 302 v
<b>How to Govern More &amp; Micro-Manage Less</b> (H#3)	Krystine Sipple, CFRE	Rm 303 v
<b>Major Gifts: Cultivate Cultivate Cultivate...Ask</b> (H#4)	Jason Arbacheski, CAP®	Rm 304 .
What Donors Look for in Nonprofit <b>Financials</b> (H#5)	Nick Hoffman, CPA Cindy Ray, CPA Louise Schorn Smith, CPA	Rm 305 .

## 10:30-11:30 Workshop Sessions, Round #2

Organizational <b>Life Cycles</b> & Evolving Roles (H#6)	Connie Carter, CFRE	Rm 300 v
Developing a Comprehensive <b>Fundraising Plan</b> (H#7)	Krystine Sipple, CFRE Corrine Sylvia, CFRE	Rm 302 v
<b>Internal Controls, Audits &amp; IRS 990s: What Every Board Member Needs to Know</b> (H#8)	Nick Hoffman, CPA Cindy Ray, CPA Kathy Wileczek, CPA	Rm 303 v
Cultivating <b>Constructive Board Relationships</b> (H#9)	Laura Groves, Ph.D.	Rm 304 - BHB
Avoiding <b>Legal</b> Pitfalls (H#10)	Emily Temple Abels, Esq. Jacqueline Motyl, Esq. Peter Temple, Esq.	Rm 305

11:30-11:45 Break - Select Your Boxed Lunch from **Feeding Frenzy Catering @ 3<sup>rd</sup> floor lobby**

## 11:45-12:45 Working Lunch Panel Sessions, Round #3

Nonprofit <b>Strategic Planning</b> (H#11)	Connie Carter, CFRE Krystine Sipple, CFRE Corrine Sylvia, CFRE	Rm 300 v
<b>Lessons Learned</b> on Boards (H#12)	Emily Temple Abels, Esq. Keith Burress Erik Gudmundson	Rm 302 BK Mod
<b>Lessons Learned</b> on Boards (H#12)	Cindy Ray, CPA Natalie Ortega Moran, Ed.D. Timmy Nelson	Rm 303 KAS Mod
<b>Lessons Learned</b> on Boards (H#12)	Lou Beccaria, Ph.D. Laura Groves, Ph.D. Rob Necarsulmer	Rm 304 SS Mod
Securing Your Nonprofit's Future with <b>Major &amp; Planned Gifts: The Role of Attorneys in Opening Doors</b> (H#13)	Winnie Moran Sebastian, Esq. Peter Temple, Esq. Lou Teti, Esq., CAP®	Rm 305 BHB & JA Mod

## 1:00-2:00 Closing Plenary Session, Round #4 (snack bags provided)

<b>Inclusion, Diversity, Equity &amp; Access (IDEA): The Board's Leadership Role Across the Organization</b> (H#14)	Emily Temple Abels, Esq. Rev. Dr. Kyle Boyer Keith Burress Natalie Ortega Moran, Ed.D. Timmy Nelson	Room 400/401 v KAS Mod
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