



2013 Fall Foundations Summit

October 10, 2013

5:30 – 8 PM

Agenda

- I. Welcome and Introductions
- II. Overview of Agenda
- III. Hot Topics and Updates
- IV. General Session – Non-profit Board Member Orientation/Working Session
 - a. Review of – By-laws; Board Manual, 990's, Gift Recording and Acknowledgement procedures, Conflict of Interest Policy, 2013 EOY Financial Report; 2013-14 Budget; Other
- V. Break-Outs
 - a. Treasurers' Training – back portion of room
 - i. Required reporting
 - ii. 990's
 - iii. Chart of Accounts
 - iv. QuickBooks for Non-profits
 - b. Foundation Volunteers Forum - front portion of room
 - i. Establishing Funding Priorities
 - ii. Defining your foundation's role
- VI. Next Steps, Evaluation and Closing