

# Nonprofit Board Officer Team Training

Are you a board officer who has assumed a new role and wonders if you understand the full scope of the position duties and expectations? Do you have questions about how the board officer team can work together to achieve the best results for your organization?

Whether you are an experienced board member, or new to board service, this training will strengthen your effectiveness in your position.

**Saturday, October 19, 2019**  
**9 a.m. to 3:30 p.m.**

**The Mill Casino**  
**3201 Tremont Ave, North Bend, OR 97459**

## **Who Should Attend:**

**Board Officer Teams or Individual Officers**  
**Board President / President-Elect**  
**Board Vice President**  
**Board Secretary / Secretary-Elect**  
**Board Treasurer / Treasurer-Elect**

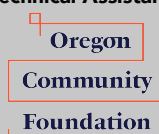
Come join us to learn from some of the most highly qualified and experienced nonprofit professionals who will share their technical and practical expertise.

This program is designed for your board officer team, however individual officers will also greatly benefit from this instruction. Each attendee will participate in a tailored instructional curriculum for their specific board position and later come together as a board team for teamwork instruction.

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**Nonprofit Technical Assistance Fund of**



# Event Schedule

**8:15 am - 9:00**      **Registration and Refreshments**

**9:00 am - 10:30**      **Welcome and Opening Session**

***Rights and Responsibilities of Board Members** - Presented by: Kirk Harvey*  
We begin our day of training with a foundational overview of the rights, responsibilities and fiduciary duties of board members under Oregon law. We will cover the legal aspects of board service, risk exposure, financial administration basics and best practices for highly functioning boards.

**10:30 am - 10:45**      **Break**

**10:45 - 12:30 pm**      **Officer Training**

***President/ President-Elect Track** - Presented by Cindy Cumfer and Kay Sohl*  
The President has an important job that goes beyond overseeing board meetings. It involves multitude of duties including setting the standard for good governance, legal compliance, board leadership and development. The President also helps guide the board to define the organization's vision, to set goals to accomplish the mission and keep the board "on track". In this workshop you will learn the best practices for board presidents and receive many useful tips.

***Secretary Track/ Secretary-Elect** - Presented by David Atkin*  
The Secretary is one of two state required positions on the Board of Directors. Secretaries have critically important responsibilities that include ensuring that regulatory reports are filed with state and federal government agencies, ensuring that the corporate records (all records, not just the board meeting minutes) are complete, accurate, protected and much, much more. In this workshop, you will learn the full scope of the position and how to approach the job to be successful. You will receive practical, experience-based insights and useful tips.

***Treasurer/ Treasurer-Elect Track** - Presented by Joe Kroll and Katherine DeYoung*  
The Treasurer is the one person that is expected to know it all when it comes to the organization's finances. But not every treasurer is an expert in finance or accounting. What financial policies should the organization have in place? What information is important and how does the Treasurer interpret it for the board to ensure they make wise decisions? And, how does the Treasurer assure the board fulfills its legal mandate to protect the assets of the organization? These are questions you will learn how to address in this practical, interactive workshop.

**12:30 pm - 1:30**      **Lunch and Networking**

**1:30 pm - 3:00**      **Board Officer Team Training**

***Bringing the Team Together** - Alexis James*  
In this session we will practice engaging and effective teamwork strategies that strengthen board effectiveness and increase board engagement and retention. You can expect to practice your skills through real life problem solving.

**3:00 pm - 3:30**      **Questions and answers and closing**

**Discount for early registration ends October 5, 2019**



Nonprofit Board Training and Resources  
P.O. Box 780  
Philomath, OR 97370  
541-929-2155  
[www.trainingnonprofitboards.org](http://www.trainingnonprofitboards.org)

# Our Instructors

**David Atkin, Attorney, Director for the Center for Nonprofit Law**

David Atkin works with nonprofit organizations throughout the United States and internationally including locations such as Asia and Latin America. He regularly presents educational programs on nonprofit law for charitable organizations, universities, political organizations and churches.

**Cynthia Cumfer, Attorney (Retired)**

Cynthia is a retired attorney who worked with thousands of nonprofit organizations in her 38 years as a lawyer and workshop leader. She is the co-author of "The Oregon Nonprofit Corporation Handbook", now in its 5th edition, which is widely used by Oregon nonprofits and the professionals who serve them. She also wrote numerous chapters on nonprofit law for the Oregon State Bar and taught the first law school classes in Nonprofit Law in Oregon.

**Katherine DeYoung, Certified Public Accountant**

Katherine is a CPA who has worked extensively with nonprofit organizations throughout her 30+ year accounting career. She is the founder of the Center for Nonprofit Stewardship and led that organization for 15 years and is co-founder of Nonprofit Board Training & Resources. In addition, she is the author of "A Toolkit for Writing Nonprofit Financial Policies" and a "Nonprofit Internal Audit Workbook."

**Kirk Harvey, CFE, Oregon Department of Justice, Charitable Activities Section (retired)** Kirk was the Chief Investigator for the Charitable Activities Section of the Oregon Department of Justice. He is a Certified Fraud Examiner with over 30 years of experience in nonprofit governance regulation and auditing. He holds an MPA in Nonprofit Management from Portland State University and is the President of Nonprofit Board Training and Resources.

**Alexis James, Director, Training & Organization Development, Cascade Employers Association** Alexis is a longtime educator and innovator. She supports Cascade members in activating contemporary responses to leadership development and employee needs through training, coaching, and team building. Prior to joining the Cascade team, she was the Program Director at a statewide literacy nonprofit, where she specialized in creating an inclusive culture through supervision training, data analysis, and diversity, equity, and inclusion implementation.

**Joe Kroll, Internal Revenue Service**

During the 30+ years Joe has spent at the Internal Revenue Service, he has held a variety of positions, including Exempt Organization Manager where he managed employees who conduct examinations of organizations with religious, charitable, scientific, literary, educational, civic, labor, agricultural, social and fraternal purposes. Currently Joe works nationally to develop outreach systems that reduce the struggle to comply with complex tax laws.

**Kay Sohl, Consultant, Kay Sohl Consulting**

Kay has provided training and consultation for Executive Directors, CFOs, and Boards of Directors of over 7,000 nonprofit organizations throughout the United States. She founded and led Technical Assistance for Community Services (now known as the Nonprofit Association of Oregon). Kay is also co-author of the "Oregon Nonprofit Corporation Handbook," which has sold over 11,000 copies.



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# More Information

## What is NBTR?

Nonprofit Board Training and Resources strengthens the nonprofit community by supporting its leaders in their critical roles. The primary service of NBTR is to provide workshops, like this one, that focus on strengthening the technical skills of nonprofit organization board members and staff.

## Upcoming programming

Training For Your Nonprofit Board  
Lebanon Public Library  
Lebanon, Oregon  
October 1, 2019

Nonprofit Board Governance Training  
22 Workshop Choices (Including Board Officer Training)  
Salem Convention Center  
November 9, 2019

## Lodging Information

### The Mill Casino Hotel

3201 Tremont St.  
North Bend, OR 97459  
800.953.4800  
[www.themillcasino.com](http://www.themillcasino.com)

A limited number of rooms are available at a group discount price. Book before October 2nd to receive their group discount rate of \$120 + tax for rooms in the "Tower" and \$110 + tax for rooms in the "Lodge." Lodging is subject to availability.

Join our Mailing List: [www.trainingnonprofitboards.org](http://www.trainingnonprofitboards.org)



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# Register Online: [trainingnonprofitboards.org](http://trainingnonprofitboards.org)

or mail:

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## Payment:

Until Oct. 5, 2019

Individual Rate \_\_\_\_\_ person @ \$60 ea

Group Rate \_\_\_\_\_ people @ \$50 ea  
(3 or more)

After Oct. 5, 2019

Individual Rate \_\_\_\_\_ person @ \$75 ea

Group Rate \_\_\_\_\_ people @ \$65 ea  
(3 or more)

Total Enclosed \$ \_\_\_\_\_

Total Enclosed \$ \_\_\_\_\_

Organization: \_\_\_\_\_

Your Name: \_\_\_\_\_

Street Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Individuals Attending Attendee's Name Email Address Food Preference:  
Standard, Vegetarian  
or Gluten-Free

President or President-Elect \_\_\_\_\_

Vice-President \_\_\_\_\_

Secretary or Secretary-Elect \_\_\_\_\_

Treasurer or Treasurer-Elect \_\_\_\_\_

*Registration fee is nonrefundable.* You may change persons attending but if you feel 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 \$35 cancellation processing fee.