The New Essentials for Local Education Foundations

For established foundation leaders, board members, executive directors and senior staff.

Attendees will focus on current changes and best practices in this era of increased accountability. Focus will be on board, legal and, and financial information your foundation must know to be proactive and navigate changing times successfully. Workshop will also include time for executive directors & senior staff to met together to discuss their unique role in guiding the foundation and getting the best from their board members. Foundation presidents and board members will meet separately to discuss their role in hiring and working with foundation staff. This workshop is a must for all foundation leaders –whether you are a volunteer organization or have paid staff. Make sure you understand your role in leading your education nonprofit and avoid costly errors and omissions!

8:45 a.m. Introduction and Welcome

9:00 a.m. Board Issues -- *Maridel M. Moulton, Organizational Development*

9:30 a.m. Financial Issues -- *Terri Montgomery, Vavrinek, Trine, Day & Company, LLP*

10:00 a.m. Legal Issues – *Ronald Vera, Gutierrez & Vera, LLP*

10:30 a.m. AM Break

10:45 a.m. Breakouts for Executive Directors and Foundation Leaders
– Executive Director/ Staff Session facilitated by *Nice Alterman, Nice Alterman & Associates*
– Board Leaders/ Administration(?) Facilitated by *Maridel Moulton, Organizational Development*

11:30 a.m. Group comes together for debriefing

12:00 a.m. Adjourn – box lunches will be available for full-day attendees