

ROUNDTABLE SERIES FOR NONPROFIT ORGANIZATIONS

SPRING 2010

A Team Dedicated to the Success of Nonprofits

BURR PILGER MAYER

COBLENTZ, PATCH, DUFFY & BASS LLP

ESSEX & DRAKE FUND RAISING COUNSEL

RUSHER LOSCAVIO EXECUTIVE SEARCH

ROUNDTABLE PARTNERS



Building your future

Burr Pilger Mayer (BPM) has been serving the nonprofit industry since its inception in 1986. The firm offers services that expand beyond traditional accounting and tax compliance. The BPM Nonprofit Services Group is an innovative team of Accountants and Consultants providing nonprofit organizations with accounting, audit, tax, budgeting, outsourcing and software selection services. BPM also provides consultation in the areas of planned giving vehicles, retirement plans and investment policies.

www.bpmcpa.com

415/421-5757

COBLENTZ, PATCH, DUFFY & BASS LLP ATTORNEYS AT LAW

A full-service law firm offering expertise in all aspects of tax and nonprofit corporate law fundamental to the operation of a nonprofit organization. Services include organization and tax-exemption, operational issues, foundation issues, welfare and church exemptions from property tax, director and officer liability, political and lobbying activities, real estate matters, and charitable planning. Clients include public charities with national and international programs, national land conservation organizations, churches, museums, schools and related educational organizations, private foundations, charitable trusts, trade associations, and the patrons, directors and trustees of such entities.

www.coblentzlaw.com

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essex & drake

◆ FUND ◆ RAISING ◆ COUNSEL ◆

Essex & Drake Fund Raising Counsel offers extensive experience in all aspects of development planning, major gifts programs and capital campaigns. We specialize in feasibility and pre-campaign studies, board training, solicitation strategies, fundraising coaching, development audits, event planning, marketing/pr and branding, and full and part-time direction of capital campaigns.

www.essexdrake.com

408/294-7779



RUSHER LOSCAVIO
EXECUTIVE SEARCH

Rusher Loscavio is a full-service executive search firm serving the nonprofit communities of the Arts, Education, Environment, Foundations, Social Services, Healthcare/Hospitals and others in Northern California and nationally. We focus on CEO/Executive Director, Board Member, Fund Development and Senior-level financial executive searches. Our *Strategic Board Recruitment: The Not-for-Profit Model* is used by exempt organizations throughout the United States.

www.rll.com

415/765-6600

SPRING 2010 CALENDAR



March 12	Preparing for and Making Successful Major Gift Solicitations
March 16	Internal Control Check-Up
March 17	Barriers to Board Building: Strategies for Board Development
March 18	The IRS and Intermediate Sanctions
March 24	Recruiting Board Members, Executives and Volunteers As Though Your Organization's Life Depended on It
March 30	QuickBooks in the Nonprofit Environment
March 31	Merging Nonprofit Organizations
April 6	Cause Marketing - How to Utilize your "Brand" to Raise Funds
April 7	Nonprofit Dashboards to Stay Informed and Make Decisions
April 13	American Recovery & Reinvestment Act of 2009
April 14	Alternate Sources of Funding
April 15	The Power of Online Auctions
April 20	The Single Audit: What it Means for the Auditee
April 22	Employment Hot Topics
April 23	Moving Current Members and Donors to Major Donor Levels
April 27	QuickBooks and IT Controls
April 28	Executive Director and Board: Building a Balanced Team
May 6	Nonprofit Accounting Update
May 7	Building A Fund Raising Board
May 11	Government Indirect Costs: Establishing Reimbursement Rates with FAR
May 12	Skeptical Strategic Planning: How I Learned to Distrust All but One Approach
May 20	New Developments for Development Offices: What You Need to Know in 2010
May 21	Marketing Your Organization for More Successful Fundraising
June 11	Strategies for a Successful Capital Campaign

THESE PRESENTATIONS ARE OFFERED AT NO CHARGE TO THE PARTICIPANTS.

SPRING 2010 SCHEDULE

PREPARING FOR AND MAKING SUCCESSFUL MAJOR GIFT SOLICITATIONS

Are your prospects ready for a major donor ask? How do you prepare yourself and your prospects for mutually successful end results? We'll review steps for excellent preparation and demo some good solicitation strategies.

Sharon Svensson and Rob Kusel, Essex & Drake Fund Raising Counsel
Friday, March 12, 9:00 to 11:00 a.m.
World Affairs Council, San Francisco
Register: www.essexdrake.com

INTERNAL CONTROL CHECK-UP

Reducing the risks of errors and fraud.

Clark Keeler, Director, Burr Pilger Mayer
Tuesday, March 16, 9:00 to 10:30 a.m.
Burr Pilger Mayer, San Francisco
Video conference to Palo Alto, San Jose and Walnut Creek
Register: www.bpmcpa.com or 415/288-6296

BARRIERS TO BOARD BUILDING: STRATEGIES FOR BOARD DEVELOPMENT

Robert M. Fisher, President, Non-profit Leadership and Foundations at Rusher Loscavio and CEO (Retired) The San Francisco Foundation
Wednesday, March 17, 9:00 to 11:00 a.m.
Rusher Loscavio Executive Search, San Francisco
Register: 650/494-0883 Jackie Rusher

THE IRS AND INTERMEDIATE SANCTIONS

A discussion on how to protect your organization from intermediate sanctions.

John Panetta, Shareholder, Burr Pilger Mayer
Thursday, March 18, 9:00 to 10:30 a.m.
Burr Pilger Mayer, San Francisco
Video conference to Palo Alto, San Jose and Walnut Creek
Register: www.bpmcpa.com or 415/288-6296

RECRUITING BOARD MEMBERS, EXECUTIVES AND VOLUNTEERS AS THOUGH YOUR ORGANIZATION'S LIFE DEPENDED ON IT

Thriving, not just surviving!

J. Michael Loscavio, President, Rusher Loscavio Executive Search
Wednesday, March 24, 9:00 to 11:00 a.m.
Rusher Loscavio Executive Search, San Francisco
Register: 650/494-0883 Jackie Rusher

QUICKBOOKS IN THE NONPROFIT ENVIRONMENT

Karen Pfau-Martinez, Manager, Burr Pilger Mayer
Tuesday, March 30, 9:00 to 10:30 a.m.
Burr Pilger Mayer, San Francisco
Video conference to Palo Alto, San Jose and Walnut Creek
Register: www.bpmcpa.com or 415/288-6296

MERGING NONPROFIT ORGANIZATIONS

A look at accounting due diligence issues for considering nonprofit mergers.

Geralyne Mahoney, Shareholder, Burr Pilger Mayer
Wednesday, March 31, 12:00 to 1:30 p.m.
Burr Pilger Mayer, San Francisco
Video Conference to Palo Alto, San Jose, Santa Rosa and Walnut Creek
Register: www.bpmcpa.com 415/288-6296

CAUSE MARKETING - HOW TO UTILIZE YOUR "BRAND" TO RAISE FUNDS

Bruce Burtch, The Cause Marketing Catalyst
Tuesday, April 6, 9:00 to 10:30 a.m.
Burr Pilger Mayer, San Francisco
Video conference to Palo Alto, San Jose, Santa Rosa and Walnut Creek
Register: www.bpmcpa.com or 415/288-6296

NONPROFIT DASHBOARDS TO STAY INFORMED AND MAKE DECISIONS

Neil Erickson and Rebecca Teutschel, Shareholders, Burr Pilger Mayer
Wednesday, April 7, 12:00 to 1:30 p.m.
Burr Pilger Mayer, San Francisco
Video conference to Palo Alto, San Jose and Walnut Creek
Register: www.bpmcpa.com or 415/288-6296

AMERICAN RECOVERY & REINVESTMENT ACT OF 2009

Discuss the background, opportunities for funding and grant requirements of the ARRA.

Stacie Kowalczyk, Manager, Burr Pilger Mayer
Tuesday, April 13, 9:00 to 10:30 a.m.
Burr Pilger Mayer, San Francisco
Video conference to Palo Alto, San Jose, Santa Rosa and Walnut Creek
Register: www.bpmcpa.com or 415/288-6296

ALTERNATE SOURCES OF FUNDING

Affording to do what you can't afford not to do: bonds, guarantees, program-related investments, forgivable loans/grants, tax-structured transactions, licensing, revenue-sharing, for-profit/social enterprise operations, tapping unusual forms of foundation support, etc.

Robert M. Fisher, President, Non-profit Leadership and Foundations at Rusher Loscavio and CEO (Retired) The San Francisco Foundation
Wednesday, April 14, 9:00 to 11:00 a.m.
Rusher Loscavio Executive Search, San Francisco
Register: 650/494-0883 Jackie Rusher

THE POWER OF ONLINE AUCTIONS

Learn how to conduct your organization's annual online auction. This session will cover all of the essential elements and best business practices that need to be considered and implemented for a successful cyber event.

Rob Kusel, Essex & Drake Fund Raising Counsel
Thursday, April 15, 9:00 to 11:00 a.m.
World Affairs Council, San Francisco
Register: www.essexdrake.com

THE SINGLE AUDIT: WHAT IT MEANS FOR THE AUDITEE

Stacie Kowalczyk, Manager, Burr Pilger Mayer

Tuesday, April 20, 9:00 to 10:30 a.m.

Burr Pilger Mayer, San Francisco

Video conference to Palo Alto, San Jose and Walnut Creek

Register: www.bpmcpa.com or 415/288-6296

EMPLOYMENT HOT TOPICS

Stephen Lancot, Coblenz, Patch, Duffy & Bass LLP

Thursday, April 22, 3:30 to 5:30 p.m.

Coblenz, Patch, Duffy & Bass LLP

Register: nonprofit@coblenzlaw.com or 415/677-5208

MOVING CURRENT MEMBERS AND DONORS TO MAJOR DONOR LEVELS

Do you have challenges moving your members or lower end donors up to the major donor level? Are you offering your Major Donors the benefits they deserve? Are they well cultivated, stewarded, and ready to move up?

Rob Kusel and Sharon Svensson, Essex & Drake Fund Raising Counsel

Friday, April 23, 9:00 to 11:00 a.m.

World Affairs Council, San Francisco

Register: www.essexdrake.com

QUICKBOOKS AND IT CONTROLS

A review of technology controls when using QuickBooks.

Roy Maynard, Shareholder, Burr Pilger Mayer

Tuesday, April 27, 12:00 to 1:30 p.m.

Burr Pilger Mayer, San Francisco

Video conference to Palo Alto, San Jose and Walnut Creek

Register: www.bpmcpa.com or 415/288-6296

EXECUTIVE DIRECTOR AND BOARD: BUILDING A BALANCED TEAM

Defining roles, creating and maintaining a healthy distribution of authority and responsibility, managing boundaries.

Robert M. Fisher, President, Non-profit Leadership and Foundations at Rusher Loscavio and CEO (Retired) The San Francisco Foundation

Wednesday, April 28, 9:00 to 11:00 a.m.

Rusher Loscavio Executive Search, San Francisco

Register: 650/494-0883 Jackie Rusher

NONPROFIT ACCOUNTING UPDATE

Daniel Figueredo, Manager, Burr Pilger Mayer

Thursday, May 6, 12:00 to 1:30 p.m.

Burr Pilger Mayer, San Francisco

Video conference to Palo Alto, San Jose, Santa Rosa and Walnut Creek

Register: www.bpmcpa.com or 415/288-6296

BUILDING A FUND RAISING BOARD

What percentage of your board members are actively involved with fundraising? How do you improve that? How do you get great results from creating Individual Fund Raising Plans with your board members?

Sharon Svensson and Chuck Cole, Essex & Drake Fund Raising Counsel

Friday, May 7, 9:00 to 11:00 a.m.

World Affairs Council, San Francisco

Register: www.essexdrake.com

GOVERNMENT INDIRECT COSTS: ESTABLISHING REIMBURSEMENT RATES WITH FAR

Mike Spence, Shareholder, Burr Pilger Mayer

Tuesday, May 11, 12:00 to 1:30 p.m.

Burr Pilger Mayer, San Jose

Video conference to Palo Alto, San Francisco and Walnut Creek

Register: www.bpmcpa.com or 415/288-6296

SKEPTICAL STRATEGIC PLANNING: HOW I LEARNED TO DISTRUST ALL BUT ONE APPROACH

Robert M. Fisher, President, Non-profit Leadership and Foundations at Rusher Loscavio and CEO (Retired) The San Francisco Foundation

Wednesday, May 12, 9:00 to 11:00 a.m.

Rusher Loscavio Executive Search, San Francisco

Register: 650/494-0883 Jackie Rusher

NEW DEVELOPMENTS FOR DEVELOPMENT OFFICES: WHAT YOU NEED TO KNOW IN 2010

A discussion of Lobbying in an election year, data privacy in the Web 3.0 world, and the 2010 estate planning landscape.

Cynthia Rowland and Anthony Vecino, Coblenz, Patch, Duffy & Bass LLP

Thursday, May 20, 3:30 to 5:30 p.m.

Coblenz, Patch, Duffy & Bass LLP, San Francisco

Register: nonprofit@coblenzlaw.com or 415/677-5208

MARKETING YOUR ORGANIZATION FOR MORE SUCCESSFUL FUNDRAISING

Back by popular demand. Join us to learn what donors want to know about your organization and how to get them to open their pocket books.

Chuck Cole, Essex & Drake Fund Raising Counsel

Friday, May 21, 9:00 to 11:00 a.m.

World Affairs Council, San Francisco

Register: www.essexdrake.com

STRATEGIES FOR A SUCCESSFUL CAPITAL CAMPAIGN

The time is right to start planning and implementing the capital campaign you've been thinking about. The prep work is essential while you recruit your Board and volunteers to take leadership roles. Join us for many tried and true experiences so you are effective and successful.

Rob Kusel and Chuck Cole, Essex & Drake Fund Raising Counsel

Friday, June 11, 9:00 to 11:00 a.m.

World Affairs Council, San Francisco

Register: www.essexdrake.com



ROUNDTABLE LOCATIONS

BURR PILGER MAYER

600 California Street, Suite 1300
San Francisco, CA 94108

Two Palo Alto Square, Suite 250
3000 El Camino Real
Palo Alto, CA 94306

100 Pringle Avenue, Suite 340
Walnut Creek, CA 94596

60 S. Market Street, 8th Floor
San Jose, CA 95113

5 Hamilton Landing, Suite 120
Novato, CA 94949

110 Stony Point Road, Suite 210
Santa Rosa, CA 95401

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One Ferry Building, Suite 200
San Francisco, CA 94111

RUSHER LOSCAVIO EXECUTIVE SEARCH

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San Francisco, CA 94105

ESSEX & DRAKE FUND RAISING COUNSEL

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San Francisco, CA 94108

