



# NONPROFIT EDUCATIONAL WORKSHOP SERIES

## Upcoming Dates

Thank you to our generous sponsors:  
Grinnell College, Grinnell Mutual Reinsurance Company and  
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### August 16, 2018

#### Nonprofit Financial Overview

- Review the fiscal responsibility of a nonprofit board of directors.
- Understand the importance and place of financial statements in the nonprofit world.
- Explore nonprofit financial statements and identify key items of importance.

### September 20, 2018

#### New Tax Law in the Nonprofit World

- Overview of the Tax Cuts and Jobs Act
- Understand how the new tax law impacts nonprofits.
- Review and look at giving trends during 2019.

### October 18, 2018

#### Fundraising for Nonprofits

- Review and understand different fundraising methods.
- Review and understand different types of giving.
- Gift Acceptance Policy – Does your organization need one?
- Review and look at giving trends during 2019.

### January 17, 2019

#### Dashboards: Making Data Work

- Review and define dashboards for nonprofits.
- Review and understand the types of information that can be delivered using a dashboard.
- Learn to create a simple financial dashboard

### February 21, 2019

#### Audits and 990s

- Review types of tax filing for nonprofits.
- Review a simple 990 and learn what information on the 990 is important.
- Guidestar
- Understand the auditing process for a 990.

### April 18, 2019

#### Creating a Budget

- Understand the correlation between a mission statement and budget.
- Understand sustainability of a nonprofit.
- Determine the information necessary to complete a budget.
- Spending Policy – Does your organization need one?
- Create a sample budget.

### June 20, 2019

#### Investments in the Nonprofit World

- Understand the importance of investments to the sustainability of a nonprofit.
- Review and understand investment options available.
- Investment Policy – Does your organization need one?

### Additional Topics To Cover

- Charitable Solicitation Registration
- Planned Giving & Bequests
- General Governance
- Governance Functions
- Finance/Audit/Executive/Investment Committees

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**Limited class size | No charge for workshop or lunch**