League of California Community Foundations

COMMUNITY FOUNDATION BOARD BASICS COURSE

September 25, 2015
Monterey, CA

OVERVIEW	Board Basics Course is an all-day, intensive course designed specifically for Community Foundation Board Members. The course is created and taught by experienced leaders in the field and is relevant to board members representing community foundations of all sizes
Learning Objectives	Gain a comprehensive understanding of community foundations Understand what individual and full board roles and responsibilities are in areas critical to the success of the organization Interact with board members from throughout the state and from varying asset sizes
Discussions on the essentials that all board members should know	Community Foundation: What it is and how it differs from other nonprofits Governance & Mission: The role of the board and its members Legal & Fiduciary: Responsibilities and regulations/implications Committees & Policies: Participation and creation Fund Development: The board and board member's role? Different Types of Funds: The fund types generally held by a community foundation Grants and Scholarships: Trends, pros and cons Community Leadership: What is happening in the field, and what is the board's role? Lessons Learned
Location	**Community Foundation for Monterey County Board Room** 2354 Garden Road Monterey, CA 93940-5326 831-375-9712 www.cfmco.org

League of California Community Foundations

BOARD BASICS
Registration Form

September 25, 2015

Community Foundation for Monterey County

Name:

Name preferred on name badge:

Foundation name:

Mailing address for registration confirmation:

Phone	*Email*

Length of time on Foundation Board

Committee(s) on which you serve

Leadership position you hold/held (officer title)

Occupation/Vocation

Course Fee Information

League Member Registration Fee is $325.00
Non-League Member Registration Fee is $400.00

Cancellation Policy

To cancel your registration, please inform us in writing (barbara@lccf.org). A full refund minus a $100.00 administrative fee is available through August 15, 2015. No refund is available after August 16, 2015. Substitutions from the same foundation are accepted at any time with no penalty.

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BOARD BASICS

Registration Form

To complete your registration, please mail the registration form with a check to:

League of California Community Foundations
P.O. Box 1303
Jamestown, CA 95327

Course is limited to the first 30 board members who complete their registration.

Please note that your registration is not complete until your check is received.

Questions? Contact Barbara Luke, Executive Assistant, at barbara@lccf.org; 209.984.3955

Recommended Lodging:

Travel and Hotel Information: recommendations to come

Registration and Fee Information:

The course fee is $325.00 for League members; $400 for non-members.

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Faculty

Lara Kalwinski**.** As a member of the Council on Foundations legal and policy team, Lara is also the Director of the National Standards for U.S. Community Foundations™ program.
Lara brings nearly a decade of nonprofit and foundation management expertise to the Council. She is known for reversing nonprofit program deficits; auditing international grantmaking procedures among US, German, Mexican and Indian organizations; creating gift acceptance procedures to ensure regulatory compliance; and implementing community led grant program design. After graduating with a joint MPA/JD from Indiana University, Lara worked for international, religious, and community foundations from India to Indiana. Lara is a product of a community foundation. She received a four-year Lilly Endowment Community Scholarship from Legacy Foundation. The contacts through the community foundation led to research, internship, and job opportunities in Ghana, Liberia, India, and Indiana. She is a recipient of the Indiana Governor's Award for Tomorrow's Leaders. She has trained nonprofit staff and boards on grantwriting, management, board governance, and fundraising.

Patricia Jones. Patricia is the CEO for the League of California Community Foundations and has worked with the League since 2007. She was a community foundation board chair when the League formed and was highly supportive of the idea. Patricia Jones is also the Principal in the business consulting firm, Patricia Jones Consulting. Since 1998, she specialized in business planning, strategy and research - primarily for California-based nonprofit organizations and public agencies; although her practice often takes her out of state as well. Most of her practice is with community foundation boards and senior staff in (i) coordinating with key stakeholders to create the environments and structures to strengthen an organization's ability to deliver effective services, (ii) developing comprehensive planning processes, reports and evaluations, (iii) researching and presenting business options to senior management, boards, affiliate officers and other key constituents and stakeholders, and (iv) facilitating high-level corporate meetings and retreats. With an MBA (dual emphases in finance and communication) and an undergraduate degree in science, she understands the importance of solid research, the complexities of business, the significance of financial matters, and value of creating synergies among working partners. Patricia also serves as a National Standards for U.S. Community Foundations™ Peer Evaluator.

Questions? *Contact Barbara Luke, Executive Assistant, at barbara@lccf.org; 209.984.3955*