



PERSONALIZED GRANT SUPPORT

Presenter: Charlotte Gill

June 6, 2018 10:30 - 11:30 am

June 20, 2018 10:30 - 11:30 am

Are you just beginning your organization's grant-seeking journey? Looking for guidance researching foundations? Need another set of eyes on that proposal? Maybe you are new to grant writing and not sure where to begin? Sign up for one hour of customized one-on-one support with our development expert.

Registration 

Member rate: FREE

Non-member rate: \$45

Become A Member of Nonprofits First

Members of Nonprofits First enjoy exclusive benefits designed to increase your capacity to serve the needs of your clients. In addition to the cost saving opportunities on all Nonprofits First services, members are part of a community of nonprofit professionals with a demonstrated commitment to the continued strengthening of our industry.

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Looking for a job in the nonprofit sector?
Visit www.501cjobs.org to view job postings,
submit an application, and attach your resume.



SESSION 2 OF 3 - CONSIDERATIONS FOR TAX-EXEMPT ORGANIZATIONS WHO HOST SPECIAL EVENTS (WEBINAR)

*Presenters: Brittney Kocaj, CPA &
Gina Ardillo, CPA*

June 12, 2018 12:00 pm

Overview of potential implications that may arise from a special event hosted by a tax-exempt organization, including Form 990 reporting requirements, associated transactions that could result in additional tax filings, and activities that constitute unrelated business income.

Member rate: FREE

Non-member rate: \$35

This webinar is the second of a three-part Special Events webinar series. Completion certificates will be awarded to participants who successfully complete all three sessions.

Registration 



LEARNING LAB: MASTERING DATA OVERLOAD WITH EXCEL – AUTO-FILTERS AND PIVOT TABLES

*Presenter: Diane Henderson
06/13/2018 3:00 - 5:00 pm*

Do you have tons of data to report on? Are you reporting numbers and data on a monthly or quarterly basis? Are you using Filters and Pivot Tables? If not this is a must have class. You can save HOURS using these features two features Pivot tables and autofilters

Microsoft Excel – Auto-Filters and Pivot Tables Class Will Cover:

Registration ▶

- Prepare data for PivotTable reporting
- Create PivotTables from various data sources
- Analyze Data Using PivotTables
- Work with PivotCharts
- Use Autofilter

Member rate: \$59

Non-member rate: \$69



SESSION 2 OF 3 - CONSIDERATIONS [Events in a Digital Age: How to Maximize Offline Events in an Online World](#)

Presenter: Dana Ostomel

June 14, 2018 1:00 - 2:00 pm

Events like galas, walks and auctions are critical to the fundraising (and friend-raising) strategies for most nonprofits. Want your next one to be a hit? Give it digital legs. With the vast number of online tools available, you can streamline everything from event registration to email marketing to social media, ensuring you capture your audience right where they are: online. Join Dana Ostomel to learn how to plan your next event with digital in mind from day one, including:

- The importance of integrating digital into your event.
- 3 key goals to help you measure success.
- 5 digital must-haves to keep your event running smoothly.

Registration ▶

Member rate: FREE

Non-member rate: FREE

Group Purchasing Program

We've worked with our partner Consolidus to provide our members with discounted vendor pricing. By using the power of combined purchasing, you'll pay less for things you use every day. [Read More](#)



STRATEGIC PLANNING, PERFORMANCE METRICS, & RISK MANAGEMENT 3 SESSIONS

*Presenter: Paul R. Hamaty
Strategy Consultant*

June 14, 2018 9:00 am - 12:30 pm

At the end of the session, attendees will:

- Understand the basic components of a strategic plan
- Create SMART strategic goals
- Understand the benefits of risk management
- Know the types of risks and risk ratings
- Understand the importance of performance measurement/monitoring
- Create "Perfect" metrics

Registration 

****Price Drop****

Reduced rate for members: ~~\$54.99~~ \$39.99

Non-member rate: ~~\$69.99~~ \$49.99

Completion certificate will be awarded to participants who successfully complete all three sessions.



PROPERTY TAX EXEMPTIONS FOR NONPROFITS

Presenter: Katherine Enck, CFE, AAS, CMS
June 27, 2018 1:00 - 2:30 p.m.

This workshop will cover:

1. Property Tax Exemptions for nonprofits - Who is eligible and what is needed to apply to apply?
2. Tangible Personal Property - What is TPP and how can nonprofits take advantage of tax exemptions?

Member rate: FREE

Non-member rate: \$35

Registration 



MOTIVATE YOUR DONORS TO GIVE

Presenter: Jeremy D. Morse
06/28/2018 1:00 - 4:00 pm

Participants will learn key fundraising strategies that motivate individuals to act on behalf of a cause. The workshop will provide detailed instruction on how to communicate mission in a way that connects emotionally with potential donors. Participants will explore these concepts using practical exercises and will learn how to develop effective messaging for their own causes. These communication strategies will ensure fundraising campaigns produce results.

Member rate: FREE

Non-member rate: \$35

Registration 



QUICKBOOKS MADE EASY

*Presenter: Gregg S. Bossen, CPA
August 23, 2018 9:00 AM - 4:30 PM*

This course is designed for those new to QuickBooks, as well as advanced Desktop users. Gregg will stay after class to answer questions as well.

Nonprofits First Members: send an email to finance@nonprofitsfirst.org for your \$20 off coupon code.

Part 1: Essentials only: 9 a.m. – 1 p.m. - \$129

Part 2: Beyond the Essentials only: 1:30 p.m. – 4:30 p.m. - \$119

Part 1 & 2: \$149 (Early Bird until 7/23/2018) or \$169 (after 7/23/2018)

Lunch will be provided to participants registered for Parts 1 & 2

Registration 

Thanks to our partners at Literacy Coalition of Palm Beach County for hosting the event.

Nonprofits First Members: send an email to finance@nonprofitsfirst.org for your \$20 off coupon code.

Part 1: Essentials: 9:00 am - 1:00 pm

Essentials gives you everything you need to know on how your QuickBooks® files need to be set up in order to provide the reporting your board, accountant, and you need to operate a nonprofit. The materials will cover the basics of setting up and entering transactions specifically for Nonprofits, as well as advanced topics and an overview of the software updates included in the QuickBooks® 2017

Essentials Topics Include:

- Setting up the correct Accounts
- Entering Your Programs.
- Adding Your Annual Budget.
- Entering Your Outside Payroll.
- Creating Reports for the Board.
- Creating Reports for Your Accountant.
- Tracking Your Members and Donors.
- Tracking Grants, Pledges, and Dues.

- Year-End Acknowledgments.

Plus: What's New in QuickBooks

- Insights Tab Updated in 2015
- Comments on Reports in 2015
- Track Potential Donors in the new Lead Center
- New Calendar that includes: Appointments and To-Do's
- Attaching Scan Documents for free
- Using the New Report Center
- Cutting & Pasting lists from Excel into QuickBooks
- Updating to the latest Version
- Comparing the On-Line Edition to the Desktop Version
- New search feature and more

Part 2: Beyond the Essentials: 1:30 pm - 4:30 pm

For those of you who want to learn more than just the Essentials, Part 2, is definitely more intense. This section will cover advanced material to really help you do some helpful and amazing things.

The advanced topics include:

- Tracking Special Fundraising Events.
- Printing personalized Donor Thank-You Letters directly from QuickBooks
- Tracking Funds
- Two Ways to get year-end donor- Acknowledgements
- Finding Bank Reconciliation Outages
- Recording In-Kind Contributions
- Customizing Forms
- Memorizing Repeating Transactions.
- Auto-Recording Membership Dues.
- Tracking Volunteers.
- Advanced Budgeting by Grant/Program.
- Advanced method of Auto-Allocating Expenses to Programs/Grants.
- And More!



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