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a program of nonprofit montgomery

FIRM Alumni Sessions 2013-2016

2015-16

How to Do Business with Montgomery County Government– September 2015
What all nonprofits should know about Montgomery County Government's resource opportunities and procurement processes, new and anticipated policy and procedural changes, plus where to turn for help with resolving problems.

Featuring: Cynthia James of Community Bridges, Cherri Branson and Pam Jones of the Office of Procurement, Vicki Buckland of the Department of Health and Human Services, Stevens Brown of the Department of Housing and Community Affairs and Adriane Clutter of Department of Recreation.

Your Numbers Matter – The Funders Perspective– December 2015
What do you want to know about the criteria funders use to determine their grantmaking decisions? Are there specific benchmarks? Is my organization compared to others in my sector or region? What stories do I need to make sure my financial reports and budgets tell?

Hear from: Karen FitzGerald, Senior Program Officer, The Eugene and Agnes Meyer Foundation
Anna Hargrave, Executive Director, The Community Foundation for Montgomery County,
Jeannan Peterson, Senior Vice President / Market Manager, Bank of America Greater Washington, DC
Enterprise Business & Community Engagement

Cybersecurity - What You Don't Know Can Hurt You! – April 2016
Cybersecurity breaches, whether in large corporations or the government, are increasingly in the news. Nonprofits are not immune from cybersecurity concerns. Montgomery County recognizes that nonprofits may be vulnerable and will adding requirements for cybersecurity insurance in new county contracts. Join your FIRM alumni colleagues to find out what you need to know about cybersecurity your organization.

Join FIRM alumni in a conversation with our panel:
Kimberly Gay-Armour, CPCU, Insurance Manager, Montgomery County, Maryland
Department of Finance / Risk Management
Matthew S. Bergman, Attorney at Law, Co-Chair, Cybersecurity Practice Group, Shulman, Rogers, Gandal, Pordy & Ecker, P.A.
Meghan A. Mullee, Senior Associate Broker of Corporate & Commercial Risk, Alliant Americas
Mike Raftery, Vice President of Technology Services, 501cTECH
Moderated by Jason Green, Co-founder, SVP & General Counsel, SkillSmart, Inc.

2014-15

Human Resources – Financial Implications: *What keeps you up at night?* – October 2014

Hear Sidney Abrams, SPHR, Managing Director, Consulting Services at NonprofitHR Solutions and Marc Engel, Principal Attorney and Co-Chair of the Employment practice at Lerch, Early & Brewer discuss how to hire, develop and retain your staff … and how to fire when appropriate.

Nonprofit "ICE" – In Case of Emergency: *Fire, Flood, Snowstorm….family crisis, program disaster, computer crash….Do you have a Plan B for business as usual?* – December 2014
Join us to hear from Elliot Harkavy of EGH Associates, FEMA, The American Red Cross, and Metropolitan Washington Council of Governments, and Colleen Cibula, COO of Girl Scouts of the National Capital Region talk to issues of crisis and risk management as they affect your programs, personnel and financial management.

Operating Reserves: *Why do you need them? How much should you have? How do you get them? When do you use them?* - April 2015
Bess Foley, head of NORI (The Nonprofit Operating Reserve Initiative), a workgroup of The Urban Institute, and Courtney Kissel, ED of The Reading Connection will address how to determine reserve funding needs, develop an operating reserve policy and provide tips on how to raise these funds and how to use them.

2013-14

Financial Fraud: Not on my Watch! – January 2014
Join Eric Fraint, CPA, President and Founder of Your Part-Time Controller, and our panel of seasoned CEOs and CFOs talk about best practices in financial risk management and the different issues facing large and small organizations.

- How are nonprofit organizations at risk for financial fraud?
- How can nonprofits establish governance and internal control systems that help prevent misuse of funds?
- What are the key procedures and policies that should be in place to ensure funds are properly monitored and mitigate risk of financial fraud?
- What should be done if fraud occurs?

Managing IT to Meet Your Mission and Fit Your Budget – March 2014
Technology-frustrated CEO or COO? Accidental Staff Techie?
Join Julie Chapman, President of 501ctech and our panel of nonprofit technology managers discuss best practices in designing, budgeting and implementing an affordable IT system that will meet your strategic and day-to-day needs in financial and program management, fundraising, communications and outreach. This session will address the different issues that face both large and small nonprofits and speak to how to satisfy the diverse technology needs of staff and other stakeholders.

How to use your 990 as a Marketing Tool – April 2014
Don't let your accountants tell your story. Hear experts from Aronson LLC and Guidestar discuss how your IRS Form 990 can be utilized to promote your work in both numbers and narrative and is a powerful tool to attract and retain individual and institutional donors. A great session for CEOs and Fundraisers.

2012-13

The Matrix Map - October 2012
Join Justin Pollock of OrgForward to learn how to use the Matrix Map – a portfolio management approach to program analysis that helps identify the nexus of programmatic impact and financial returns. This tool will help you marry mission and money and focus your resources and begin strategic discussions with stakeholders.

How to Hire and Fire Financial Service Providers – December 2012
Hear from our panel of experienced nonprofit executives about how to manage your organization's relationships with your accountants, auditors, bankers, and other outsourced financial service providers.

Join Kristen Conte, VP Finance and Operations, The Meyer Foundation, Debbie Schwartz, VP Finance and Operations, The Center for Budget and Policy Priorities. And Becky Wagner, Executive Director, Advocates for Children and Youth share their successes and failures and help you identify things you can do to become an educated consumer of financial services.

How Funders Read your Numbers – April 2013
Be part of a lively discussion with our panel of presenters to discuss: What financial criteria do funders use when deciding whether to invest in my organization? What financial Information do they need? Are there specific benchmarks that are used? How is my organization compared to others in my sector or region? What stories do I need to make sure my financial reports, organization and programmatic budgets tell? Why are both historical data and budget projections needed? Audited Financials and 990s – what are they used for?

Panelists include: Miyesha Perry Chappell – Manager of Grants and Administration, Morris and Gwendolyn Cafritz Foundation; Chair, committee that produced the newly revised Common Grant Application for the Washington Regional Association of Grantmakers. Joan Schaffer - Nonprofit Consultant to Montgomery County Council Community Grants Program; Consultant to The Nonprofit Advisory Fund of The Community Foundation for Montgomery County, and Crystal Townsend - Executive Director, Healthcare Initiative Foundation