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Public Presentations (Listed by Sponsor)

AICPA – American Institute of Certified Public Accountants Annual Not-for-Profit Industry Conference, Washington D.C.

Jun 2002

- **Intercompany Relationships in Affiliated Nonprofit Advocacy Groups** (e.g. 501(c)(3) - 501(c)(4) - 527/PAC), co-presenter with John Pomeranz (75 min)

Jun 2003

- **Bleeding Edge Issues In Public Policy Advocacy** (designer & moderator, panel of John Pomeranz and Barnaby Zall (Greg Colvin cancelled)) (75 min)
- **The Operational Aspects of Advocacy / Lobbying Costs** [of charities] (75min)
- **When Worlds Collide: GAAP vs. Tax Issues for Exempt Organizations**, designer & moderator, panel of Diane Cornwell & Dick Larkin (75min)
- **Small Fundraising-Driven Organizations** lunch roundtable co-leader with Terry Fraser and Marie Arrigo (75min)
- **Tax: Ask the Experts** panel member with Jody Blazek, Harvey Berger, and Fred Rothman (75min)
- member, conference planning committee

Jun 2004

- **Exempt Organization Lobbying** [for all types of exempts] (75min)
- **Tax: Ask the Experts**, moderator, panel of Jody Blazek, Rosemary Fei, Eve Borenstein, Mary Rauschenberg, and Fred Rothman (75min)
- **Public Charity Status** and the public support tests, lunch discussion (60min)
- member, conference planning committee

Jun 2005

- **Advocacy and Lobbying** breakfast roundtable co-leader with John Pomeranz and Eve Borenstein (60min)
- **Intercompany Issues: Public Policy Tandems and Triads** co-presenter with John Pomeranz (75min)
- **Planning Issues: Tax vs. GAAP**, moderator, panel of Diane Cornwell & Dick Larkin (75min)
- **Small Membership Organizations**, industry-focus discussion co-leader with Charles Lindsay and Julie Ulmer (90min)
- **Tax: Ask the Experts**, moderator, panel of Jody Blazek, Diane Cornwell, Joe Irvine and Harvey Berger (75min)

- **Fiscal Sponsorship – Tax Aspects**, lunch roundtable (60min)
 - member, conference planning committee
- Jun 2006
- **Operational Ethics: Tuning Up Your Sensitivity**, co-presenter with Julie Floch (75min)
 - **Policies & Procedures You Should Have**, moderator, panel of Becky Phillips, Kay Sohl, and Kate Spencer (75min)
 - **Tax: Ask the Experts**, moderator, panel of Harvey Berger, Jody Blazek, Rosemary Fei, Mary Rauschenberg, and Fred Rothman (75min)
 - **Coping with Indirect Cost Rates**, lunch roundtable co-leader with Vincent Stevens (60min)
 - **Advocacy Organizations** industry focus discussion co-leader with Rosemary Fei (90min)
 - member, conference planning committee

Jun 2007

- **Affiliated Organizations and Public Policy Advocacy**, co-presenter with John Pomeranz (75min)
- **Form 990, Ask the Experts**, panel with Mary Rauschenberg, Jody Blazek, Naomi Horsager & Joe Irvine (80min)
- **Fiscal Sponsorship**, lunch roundtable with Kay Sohl (60min)
- **Orientation: Getting the Most from the Conference** (45 min)
- member, conference planning committee

AICPA Not-for-Profit Financial Executive Forum, San Francisco

Nov 2004

- **Planning Issues: GAAP vs. Tax** (105min)
- member, conference planning committee 2004

Nov 2006

- **Small NPOs Greatest Challenges for the CFO**, panelist with Kay Sohl & Jeanne Bell (120 min)
- **Policies & Procedures Really Do Matter**, panel moderator, Ted Browning & Kay Sohl (90 min, repeated once)

Nov 2007

- **Tandem Organizations: Management & Reporting**, co-presenter with Kay Sohl (tentative title, and duration t.b.d.)

Alaska Community Foundation, Anchorage

Nov 1998

- **Financial Management Workshop** (two-day, statewide participation)

Alliance for Justice, Austin and Los Angeles

Oct 2002

- **IRS Form 990 for Advocacy Organizations** (60min) part of two-day Alliance program entitled “Tax And Election Law For Public Policy: The Essentials Of Representing Nonprofits & Foundations”

Association of Alternative Newsweeklies

1980-1982

- **Newsweekly Budget Modeling** (memory unclear – 90min?; twice)
- **Financial Operating Standards & Statistics Survey** (90min?)

CalCPA - San Francisco Chapter of the Not-for-Profit Interest Group of the California Society of CPAs, San Francisco

Sep 2001

- **Public Support Tests: Context & Calculation** (90min)

Jan 2004

- **When Worlds Collide: GAAP vs. Tax** (90min)

Community Foundation of Western North Carolina, Asheville

Spring 1994

- **Financial Management Overview & Tax and Regulatory Issues** (half-day)

CompassPoint Nonprofit Services, Beyond the Bottom Line Conference, San Francisco

Nov 1997

- **Fiscal Sponsorship** (60min)

Nov 2002

- **Lobbying: Recordkeeping and Section 501(h)** (60min)

Environmental Support Center: State Environmental Leadership Conference, Phoenix

Nov 1994

- **Budgeting Techniques** (3hr)

Foundation Center - San Francisco

Jun 2003 & Jun 2004 (repeat)

- **Fiscal Sponsorship: Special Concerns for Arts Projects** panel (20min)

Nov 2006

- **Fiscal Sponsorship in Practice** (presentation to Western Region Cooperating Collections)

Lorman Education Services, Various Locations

May 2005 & Apr 2006 San Francisco
 Jan 2006 & Jan 2007 Sacramento
 Jul 2006 San Diego and Spokane
 Aug 2006 Las Vegas

- **Form 990: Critical Issues** (day-long)
 June 2006 San Jose
- **Reporting Obligations** (50 min), as part of day-long Tax Exempt Organizations in California
 Jul 2005
- **Tax Issues for Tax Exempt Organizations** (day-long), co-presenter with Hilary Crosby, CPA
 Mar 2003
- **Corporate Formation and Tax Exemption** (70min), as part of day-long Tax Exempt Charitable Organizations in California

Livable Oregon, Inc. (formerly Oregon Downtown Development Association), Portland

Fall 1995

- **Financial Management Overview for Statewide Mainstreet Managers**

NAC – Nonprofit Assistance Center, Seattle

Feb 2001

- **History and Practice of Fiscal Sponsorship** (60min)
- **501(c) 3 or Fiscal Sponsorship: Which is right for you?** moderator, panel of local fiscal sponsors and sponsored projects (day-long)

New Mexico Community Foundation, Statewide

Mar 1996

- **Managing For Changer: Financial Management Overview**, (four day-long seminars in different cities in one week)

NYSSCPA - New York State Society of CPAs Annual Exempt Organizations Conference

Dec 2005

- **Tandems & Triads: Public Policy Advocacy Structures** (65min)

Dec 2006

- **Exempt Organization Lobbying** (65min)

NWFCO - Northwest Federation of Community Organizations, Seattle

May 1999, Sep 2000, Oct 2001, Oct 2002, Mar 2004, Apr 2005

- **Financial Management Overview, Healthy Check-In and Public Policy Advocacy Rules**, presenter, and co-presenter with Liz Towne (one and two-day workshops)

OSCPA – Oregon Society of CPAs Annual Not-for-Profit Conference, Portland

- May 1998
- **Lobbying By Charities and the Section 501(h) Election** (60min)
- May 2003
- **Public Charity Lobbying: Advanced Operational Strategies Under 501(h)** (60min)
- May 2006
- **When Worlds Collide: Issues in GAAP v. TAX** (60min)

Solano Community Foundation, Fairfield, California

- Feb 2003
- **Charitable Organizations: Compliance and Reporting Issues** (day-long)

TACS – Technical Assistance for Community Services, Portland

- May 1996
- **Lobbying Issues for (c)(3) Organizations** for TACS' Nonprofit Fiscal Managers Association (80min)
- Mar 2001
- **Issues in Cash Flow Projection and Management** for TACS' Nonprofit Fiscal Managers Association (80min)
- Oct 2001
- **Fiscal Sponsorship: Being Wary, Avoiding Traps** (day-long)
- Aug 2005 & Sept 2006
- **Form 990 – Critical Issues** (day long)

TREC – Training Resources for the Environmental Community, Santa Fe

- Mar 2005
- **Financial Management Overview** (day-long)

Trustees for Alaska, Anchorage

- May 2005
- **Form 990**, (150min)

Washington State Downtown Revitalization Program, Olympia

- Mar 1995
- **Financial Management & Budgeting for Downtown Mainstreet Leaders** (day-long)

Western States Center, Community Strategic Training Initiative (“CSTI”), Portland

Jul 1991 – Jul 1999 (nine summers)

- **Managing For Change** (financial management workshop, day-long for first five years, two-days-long for final four years)