Association Education Topics

History Highlights of Non-Profits
- 1908
- 1913
- 1950
- 1997

Scrutiny IRS
- Form 990 – Policies
- Conflicts
- Compensation
- Board Review
- Record Retention
- Audit, Review, Compilation
- Whistle Blower

Policy Development and Implementation
- Common Policies
- Policy Errors
- Archiving Policies and Sunsetting

Manuals for Sustainability and Training
- Policy Manual
- Board/Leadership Manual
- Procedure Manual
- HR Manual
- Style Manual
- Crisis-Continuity Manual

Systems and Org Structure
- Operating Framework
- Inventory – Assess – Improve
- Subsidiaries
- Organizational Chart
- Subsidiaries/Agreements

Innovative and Best Practices
- Agendas and Board Meetings
- Budgeting and Financials
- Revenues and Expenses
- Nominations
- Org Charts
- Sponsorship Opportunities
- Strategic Plans
- Board/Staff Training
- Resources

Risk Management
- Insurance-Volunteer Immunity
- Corporate Status
- Minutes
- Software
- Antitrust Avoidance
- Credit – PCI Compliance
- Identity Theft
- Succession Plan

Board Roles and Responsibilities
- Tools, Resources, Best Practices
- Job Descriptions
- Board – Staff Distinctions/Roles
- Nominations Matrix-Qualifications
- Annual Orientation
- Leadership Manual
- CEO Performance
- Board Portal

Performance Excellence
- Benchmarks (990, Compensation, Operating Ratios)
- Dashboards
- Governor’s Award Performance/Baldrige
- Accreditation
- Certification (CAE)
  ✓ Organizational Management
  ✓ Leadership
  ✓ Administration
  ✓ Knowledge Management & Research
  ✓ Governance and Structure
  ✓ Public Policy, Gov’t. Relations and Coalitions
  ✓ Membership Development
  ✓ Programs, Products, and Services
  ✓ Marketing, Pr and Communications

Strategic Direction
- Retreat Planning
- Brand: Mission, Vision, Values
- Direction: Goals, Strategies, Tactics
- Annual Business Plan

Challenges