Designed for community foundations but all are welcome to participate.
Cost: $35 for Tri-State partnership members
      $50 for members of other associations

**STAYING LEGAL: THE PENSION PROTECTION ACT**
JANUARY 20 • 1:00-3:00 PM ET
Phil Purcell, J.D., vice president, Ball State University Foundation
The Pension Protection Act of 2006 (PPA) created many changes in the administration of donor advised and scholarship funds. It is essential that any community foundation involved in these activities have a thorough understanding of the Pension Protection Act and its implications for fund management. We’ve got you covered with a session that explains the ins and outs of what you need to know to stay compliant with the PPA. (Indiana)

**PULLED TWO WAYS: FINDING THE BALANCE BETWEEN STRATEGIC AND REACTIVE GRANTMAKING**
FEBRUARY 10 • 1:00-2:30 PM ET
Ashley Blanchard, associate director of philanthropy, TCC Group
What’s the right balance of proactive vs. responsive philanthropy for your community foundation? On the one hand, community foundations are entrusted to respond to the broad needs of the communities they serve. On the other, without a focused strategy, they are unable to move the needle on critical community needs. In this session you will hear from leaders who have grappled with this question as they have assumed a larger leadership role in their communities. You’ll be part of a candid conversation about the strengths and challenges of a more proactive approach, including topics such as managing external perceptions, making the case internally and the effects on donor relations. (Michigan)

**TARGETED DONOR COMMUNICATIONS**
MARCH 16 • 1:00-2:30 PM ET
Dawn Brown, executive director, Grant County Community Foundation
When it comes to crafting strategic communications, more isn’t always better. Targeted communications to donors often means doing less, more deliberately and with a custom touch. But where do you begin when honing in on a targeted approach? Learn how one foundation has seen tangible results from implementing a targeted communication plan, and the steps they took to achieve it. (Indiana)
THE SUSTAINABILITY COST TOOL
APRIL 20 • 1:00-2:30 PM ET
Terri Johnson, associate director GIFT Program, Indiana Philanthropy Alliance
David Lindberg, chief financial officer, Council of Michigan Foundations
Community Foundations know at a gut level the services they provide are critical to developing a thriving community. But how do you determine if these programs are offered in a mix that will ensure long-term sustainability, so that these services will be available forever? This webinar will introduce the Sustainability Costing Tool, which was developed to help community foundations analyze the profitability of products and services they provide to drive sustainability. Learn how to use this new tool and hear from foundations that helped to pilot the product. (Michigan)

FEAR NOT THE BOARD MEETING: EFFECTIVE (AND FUN!) BOARD GOVERNANCE
MAY 11 • 1:00-3:00 PM ET
Leslie Dunford, vice president for administration and strategic projects, The Cleveland Foundation
Explore easy-to-use tools and share tips and tricks to help you get the most out of your board meetings. Discuss a unique approach to board self-reflection -- including the possibility of unintended consequences -- and explore how to use standing committees as a means to maximize board engagement. Bring your nagging board issues and success stories to share. (Ohio)

ACCOUNTING: WHAT COMMUNITY FOUNDATION STAFF AND BOARDS NEED TO KNOW
JUNE 15 • 1:00-3:00 PM ET
Shannon Bordern, CPA, director, Blue & Co., LLC; Patrick Burkey, CPA, founder, Estep Burkey Simmons LLC; Lisa VanDeWeert, CPA, principal, The Rehmann Group
Do you dread meeting with your auditor or accounting professional? Sometimes it might feel like foundation staff and CPAs speak different languages. We’ve taken the language gap out of the equation in this webinar to bring you a simplified look at accounting. Join three accounting experts for a non-technical look at some of the most basic but important accounting concepts such as donor restrictions, agency funds, and split interest agreements. Leave with an understanding of these concepts and how they affect your community foundation. (Michigan)

TALENT RETENTION IN YOUR COMMUNITY: HOW TO BRING YOUR GRADS BACK
AUGUST 10 • 1:00-3:00 PM ET
Robin Feriby, vice president, Philanthropic Services, Community Foundation for Southeast Michigan; Randy Maiers, president & ceo, Community Foundation of St. Clair County; Mackenzie Price, executive director, Huron County Community Foundation; Duane Tarnacki, member, Clark Hill PLC
Over the past decade, many communities have been struggling from “brain-drain” – their best and brightest are being sent off to college never to return. Public, private, and nonprofit entities across the country have been struggling to develop innovative solutions to this problem. Join us to hear the story of how a group of community foundations in Michigan have implemented a Talent Retention Program to incentivize their college-educated youth to return home after obtaining a college degree. Want to start a Talent Retention Program in your community? The how-to manual for this program will be shared with all participants! (Michigan)
**HUMAN RESOURCES: ARE YOU LEGAL? THE BASICS YOU NEED TO KNOW**

**SEPTEMBER 14 • 1:00-3:00 PM ET**

Zachary Kester, J.D., executive director, Charitable Allies

Solid, effectively administered HR policies and procedures are a critical component of nonprofit and foundation governance, and serve as an indicator of overall organizational health. This session breaks down human resources into legal basics that are easy to understand and tips that are simple to implement. Explore policy manual requirements, discuss how often to update your policies and learn how to effectively and consistently administer those policies. (Indiana)

**END OF YEAR RESOLUTION: STAND OUT IN THE CROWD!**

**OCTOBER 12 • 1:00-3:00 PM ET**

Sharon R. Steele, founder, Plentiful Philanthropy

The end of the calendar year inspires charitable giving, as evidenced by the stacks of solicitations that arrive in our mailboxes. And most of us approach the inevitable appeal in the same way (usually hurriedly, as if taken by surprise or perfunctorily, as if merely an obligation). But what if we were to look at it with fresh eyes? What if we could stand out in the crowd? There are those among us that have done just that, with great success. In this case-study based conversation we'll explore examples of best practices and consider the reasons for taking a fresh look at end of year giving. After all, it only comes around once! (Ohio)

**USING THE “WHAT’S NEXT FOR COMMUNITY PHILANTHROPY?” TOOLKIT**

**NOVEMBER 16 • 1:00-3:00 PM ET**

Gabriel Kasper, Monitor Institute; others TBA

In 2014, the Monitor Institute released “What’s Next for Community Philanthropy,” a toolkit of flexible materials designed to help boards, staff teams and communities think about our changing environment and how it will affect philanthropy. Many of your colleagues in the Midwest have been using the toolkit to create great discussions and stimulate strategic thinking about adapting to a changing world. Join us to hear examples from your peers and develop you own thoughts about you can use this wonderful free resource. (Indiana)