

Rightly Ordered Financial Management

March 5 - 7, 2010

Ben Lomond Quaker Center, Ben Lomond, CA

Sponsored by Western Friend Magazine and Ben Lomond Quaker Center

Program Schedule

FRIDAY MARCH 5			
10:00 on	Registration		Orchard Lodge
12:00 - 1:15	Lunch		Orchard Lodge
1:30 - 3:00	General Session: <u>Fostering Open Conversations About Money</u>	Jill Hoyenga	Redwood Lodge
3:30 - 5:00	Concurrent Workshops		
	<ul style="list-style-type: none"> <u>Socially Responsible Investing for Meetings & Organizations</u> –What is Socially Responsible Investing (SRI)? Why should we as Quakers follow SRI guidelines? Is there more to SRI than choosing certain companies over others? How does it affect investment returns? What resources are available to you and your meeting/organization? 	Connie Brookes Melissa Stoner	Redwood Lodge Main Room
	<ul style="list-style-type: none"> <u>Creating Effective Financial Reports</u> –The whole point of doing financial accounting is to provide relevant information to decision makers. How can we do this effectively? What information is relevant to whom? How is it best communicated? 	Betsy Muench Jill Hoyenga	Redwood Lodge Upper Bunkhouse Sitting Room
6:00	Dinner		Orchard Lodge
7:30	Facilitated Peer Group Discussions, topics TBA		Orchard Lodge, Library, Redwood Lodge

SATURDAY MARCH 6			
8:00	Breakfast		Orchard Lodge
9:00 - 10:00	General Session: <u>Reading and Understanding Financial Reports</u> You have a sheet or two of numbers grouped under various headings. What do they mean? Which ones do you need to pay attention to? And why? As a Meeting member, as a committee member, as a board member, you are responsible for your organization's finances. This means you must be able to understand and interpret the numbers in order to communicate the true financial picture.	Betsy Muench Connie Brookes	Redwood Lodge

10:30 - 12:00	Concurrent Sessions		
	<ul style="list-style-type: none"> • <u>Charitable Gifts that Last Beyond a Lifetime</u> In this session we'll look at several types of gifts that donors can make that may have benefit now and also beyond their lifetime. We'll focus on the notes and bolts of Bequests, Charitable Gift Annuities, Donor Advised Fund and touch on several other gifts. The session will also suggest resources for you in offering these gifts to your donors. 	Melissa Stoner	Redwood Lodge Main Room
	<ul style="list-style-type: none"> • <u>Managing Uneven Cash Flows and Accounting for Restricted Funds</u> – Do the bills your organization needs to pay equal its income every month? If not, your organization needs Working Capital! What is it? How much of it do you need? And how do you make sure money that is given or set aside for special purposes is spent appropriately? 	Betsy Muench	Redwood Lodge Upper Bunkhouse Sitting Room
12:15	Lunch		Orchard Lodge
1:45 - 3:30	Interest Groups		
	<ul style="list-style-type: none"> • Bookkeeping, Manual and Electronic 	Betsy Muench	Location TBA
	<ul style="list-style-type: none"> • Fundraising Forum 	Melissa Stoner	Location TBA
	<ul style="list-style-type: none"> • Nonprofit Legal Issues 	Jill Hoyenga	Location TBA
	<ul style="list-style-type: none"> • Meetinghouse Property Issues 	Kathy Hyzy and Connie Brookes	Location TBA
3:30 - 6:00	Free time, with optional hike to waterfall led by	Gretta Stone	
7:30	<ul style="list-style-type: none"> • Evening gathering for socialization, relaxation and music • Group singing with Gretta and Jacob Stone, with special attention to songs about money • Invitation for participants to share poetry, songs, dance, comedy routine, etc. 		Orchard Lodge

	SUNDAY MARCH 7		
8:00	Breakfast		Orchard Lodge
9:00 - 10:30	General Session: <u>Reflecting Values in Our Finances</u> Helping your meeting and organization understand and reflect their values in their budgets, financial reporting and fundraising. Successful fundraising invites donors to share in your mission; do our budgets reflect those same priorities? Whether seeking contributions from the meeting members or from organizational donors we need to make that strong connection between their contributions and the life and vitality of our meetings and the good works of our organizations	Betsy Muench Melissa Stoner Jill Hoyenga Connie Brookes	Redwood Lodge
11:00 - 1:00	Lunch and Cleanup		Orchard Lodge
1:00 - 2:00	Closing Meeting for Worship		Location TBA