



PROJECT SAFE™

Self-Assessment For Excellence

# Protecting Your Nonprofit's Most Valuable Asset... Its Good Name

**fireproof your organization  
from *within***

... A Workshop on

**nonprofit accountability**

- When your funders visit do they smell smoke?
- Will your donors still love you, even *after* Willamette Week's feature story?
- Are fiscal worries or sensitive situations giving you insomnia?

**Why:** **The public's trust in charities' good works depends on governance and accountability.**

If any of these unnerve you, it's time to climb the fire tower of nonprofit accountability. Search the landscape, maybe dispatch a spotter plane, but remember, the greatest fire hazards are often found indoors!

# **Nonprofit Accountability**

## **— everyone is concerned!**

### **The Media**

- Daily reports of the few nonprofits engaging in questionable behavior are eroding public confidence and giving short shrift to the many.

### **The Public**

- Donors will close their minds, hearts and checkbooks if they “smell smoke”.
- Donors want to connect with their charities on many levels and do more “due diligence” before committing.

### **Government**

- Shifting responsibility for social programs from governments to nonprofits has created more demand for government oversight.
- Budget cuts and demands for “more with less” put even more pressure on nonprofit managers for strong financial management.
- Recent travesties of corporate accounting scandals, unscrupulous telemarketers, and pyramid schemes have triggered cries for charities, too, to be more accountable.
- Widespread misconceptions about the role and scope of the nonprofit sector among public and elected officials contribute to potentially inappropriate and misguided legislative mandates.

### **Be PROACTIVE - Fireproof!**

Don't wait for a crisis to hit and worry then about how to salvage your agency's good name. Take the time *now* to learn the best techniques for managing your nonprofit's public and private accountabilities – be proactive and attend this workshop.

# Workshop Description

PhilanthropyNow and Claro! LLC, two highly-respected nonprofit consultancies sponsor and present this new workshop – *Protecting Your Nonprofit's Most Valuable Asset.... Its Good Name.*

The workshop will give you the opportunity to take stock and reflect upon the real workings of your organization. Step back from your “crises du jour” and spend the day in a lively, spirited process guaranteed to energize and engage you. There will be time to think, time to reflect, and time to learn – the critical, high value thinking that you just can’t seem to get to when phones are ringing off the hook.

You’ll participate in a carefully structured series of exercises, discussions, and activities that will hold your interest in this timely and important topic!

You’ll:

- *learn about* and *practice using* a self-guided assessment tool to take home and use to review your organization’s performance in key areas
- *discover* the key questions that board leaders and staff members **MUST** be able to answer about their organizations
- *discuss* discomfiting scenarios guaranteed to spark lively debate about ways to handle ethical quandaries and public inquiries
- *formulate* a personalized follow-up plan for your agency that will help you put into action your self-assessment for accountability
- *earn* community respect for your group by self-auditing without being asked!
- *sleep soundly*, knowing that you’ve fireproofed your organization!

# Who Should Attend



- Nonprofit Sector Staff and Volunteers
- Executive Directors and Management Staff
- Board Chairpersons and Presidents
- Board Members, Trustees, Key Volunteers
- Nonprofit counsel – development professionals, CPAs, financial advisors, planned giving specialists

Are you a nonprofit professional? Invite your board chair.

Are you a board member? Bring your executive director!

Free! “360 Degree Self-Audit Protocol” for board members and officers who come as a team.

## Special Presenter

Normally each workshop includes one or more special presenters from the area who offer additional unique perspectives on nonprofit accountability.

# About Your Workshop Leaders

**Charles Bernard Maclean, PhD**, is the Founder and Chief Committed Listener for PhilanthropyNow – committed to igniting passion for community give-back. Charles researched and pioneered portions of the 360 Self-Assessment Process after hearing donors from around the country express growing distrust of nonprofits. He piloted the tool and process with Canadian nonprofit leaders. He says, "It's about helping nonprofits control their destiny and avoiding reputation-damaging exposes." Charles promises concrete plans and peer partners for ongoing support. Last year he traveled widely both domestically and abroad on a philanthropic journey sharing and learning best practices. He is the author of the "Suite Of Giving Support Tools for Major Donors and Financial Advisors" and has been interviewed on National Public Radio's Talk of the Nation. Charles is the pioneer of the *Inspiring Giving As A Way Of Living Around The World™* philanthropy project and the *Giving Opportunity Info Kiosk™*. For more information, visit [www.philanthropynow.com](http://www.philanthropynow.com).

**Deborah L. Krause, M.S.**, is the principal of *Claro! LLC*, an Oregon-based consulting company specializing in nonprofit and small business development strategies. Ms. Krause holds an M.S. in Preventive Medicine, a Mini-MBA in Nonprofit Management, and a Certificate in Financial Management of Nonprofit Organizations. She is an Adjunct Assistant Professor at Portland State University's Institute for Nonprofit Management where she teaches an innovative, highly-acclaimed course on grantseeking and fund development. With over thirty years of experience in volunteerism, board service, and as an agency executive, Deborah offers humor and insight as well as in-depth knowledge of America's nonprofit sector. As the project director for *Cultivating Communities™*, a nonprofit capacity-building project of the Shelk Advised Fund and the Oregon Community Foundation, Deborah developed a comprehensive self-assessment methodology to help community groups develop individualized organizational development plans. For more information visit [www.clarogroup.com](http://www.clarogroup.com).

**E.J. Honton, M.A.**, is a Senior Associate at *Claro!* Mr. Honton specializes in quantitative analysis, forecasting, planning, and roadmap development. He served as the Manager of Intellectual Property and a Principal Research Scientist at Battelle Memorial Institute, the world's largest contract research organization. He has been a nonprofit leader for thirty years as a program volunteer, board president, and as a marketing, planning, and program analyst. He has worked with a wide variety of nonprofit groups including the National Parks and Conservation Association, the National Park Foundation, and Hostelling International. E.J. completed Ph.D. level econometrics with an energy and public policy economics concentration. For more information visit [www.clarogroup.com](http://www.clarogroup.com).



*“The size of your universe expands or contracts based upon your courage.”*

- Anaïs Nin

**Climb the tower and learn how to fireproof!**

Fees include box lunch

Please contact us to learn about when and where the next workshops are being offered.

Register now, space is limited!

For more information visit [www.clarogroup.com/NPAccountability.htm](http://www.clarogroup.com/NPAccountability.htm) or contact us by email [info@clarogroup.com](mailto:info@clarogroup.com), or by phone at 503-294-0157.

Confirmations and directions will be emailed to you.

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I'm game ... I don't have a fear of heights when it comes to my organization!

Yes, I would like to attend the workshop on nonprofit accountability. Please add me to your mailing list for additional information. Please mail to Deborah Krause, 2046 NW Flanders, Suite 24, Portland, OR 97209-1137.

***Time***

8:00 AM                      Assembly  
8:30 – 4:00 PM              Workshop  
(Group Exercises and Discussions – Box lunches provided)

***Where***

TBD

***Name***

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***Title***

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***Organization***

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***Address***

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***Telephone  
and Email***

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***Payment and  
Credit Card  
Information***

Card Number  
┆ Visa      ┆ MasterCard      Exp. Date: \_\_\_\_\_(mo/year)

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***\$TBD/person***

Name As It Appears On Card

┆ Check Enclosed

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***Lunch  
Preference***

Signature

┆ Vegetarian    ┆ Carnivore    ┆ Non-Dairy

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