



Mayor's Office of Contract Services
Capacity Building and Oversight

**Procurement Training Institute (PTI) for
NYC Vendors**

Summer 2010

July

7/12 Smart Practices in Fundraising

9AM-5PM

Faculty: Shoshanah Goldberg, Professor at Columbia University and the New School
Judy Levine, Executive Director, Cause Effective
Don Crocker, Executive Director, Support Center for Nonprofit Management

This workshop is designed for nonprofit leaders who want to learn smart practices in fundraising in three areas. Faculty will help nonprofit executives think about the brand promise of their organization and craft a strong message about the value of their work for proposals and marketing materials, to strategically plan friend-raisers and fundraisers, and to identify aspects of the organization's activities that could be repositioned as revenue generating activities. The class will take the fear out of grant writing, developing prospects and entrepreneurial ventures. *Targeted to nonprofit board members, executive directors and development staff*

7/22 Best Practices in Nonprofit Political Activities

9AM-12PM

Faculty: IRS Tax-Exempt Bureau
New York State Charities Bureau
Allison Sesso, Human Services Council
Patrick Synmoie, Office of the City Clerk
Andrea Fastenberg, New York City Law Department
Eliot Green, Chair of the NYC Bar Association's Tax-Exempt Organizations Committee, Loeb and Loeb

This training will provide comprehensive information on the legal constraints and reporting requirements for political advocacy and how to avoid putting the tax-exempt status of a 501(c)(3) organization in jeopardy. The session will be presented from a legal perspective on 501(c)(3) tax-exempt status, and will focus on the lines around allowable political activity, political speech and political spending. The course will also provide guidance on the individual political activity of principals, employees and community members and explain the registration and reporting requirements for legislative lobbying in New York City and New York State. *Targeted to nonprofit board members, executive directors and legal staff*

August

8/18 **New York City Council Discretionary Awards**

9AM-12PM

Faculty: Jenny Walty, NYC Nonprofit Contract Facilitator
Jake Luce, Deputy Chief of Staff, Mayor's Office of Contract Services
Caitlin Caporale, Discretionary Award Compliance Coordinator
Alex Kipp, Director of Training, Conflicts of Interest Board

The administration of New York City Council discretionary awards, also called member items, can be challenging for even the most sophisticated organizations. This training will cover the new policies and procedures that have increased accountability and transparency in the award of Council funding and will cover Council selection, prequalification, contracting requirements, and conflicts of interests. Get to know the players and their roles in the discretionary award process. *Targeted to nonprofit executives, nonprofit contract managers and New York City agency staff*

Fall 2010

September

9/21 **What do Your Financial Statements Communicate about Your Organization? Best Practices for Effective Financial Management**

9AM-12PM

Faculty: Ethan Kahn, CPA, ERE Accountants & Advisors
Bryan Epps, Senior Analyst for Capacity Building and Oversight, MOCS

An organization's audited financial statements are a critical measure of financial capacity, which are reviewed by City contracting agencies to ensure that a vendor has the capacity to produce accurate books and records. It is therefore critical for nonprofits to be able to account for funds and track expenditures accurately and in a timely way to be reimbursed for their services. This course will help nonprofits understand what their financial statements communicate about their organization and how to use them as management tools. This class is intended teach participants to their own organizations financial tools. As a result participants should bring a copy of their own organizations financial statements and trial balance used for the audit. Participants are also encouraged to come with prepared questions. *Targeted to the board of directors, senior staff and fiscal staff, and New York City agency staff*

9/22 **Board Development: Best Practices for Oversight and Effective Governance**

9AM-12PM

Faculty: Rhoda Barr, Director of Client Services, Volunteer Consulting Group and BoardnetUSA
Linda Manley, Legal Director, Lawyers Alliance of New York
Jenny Walty, Assistant Director for Capacity Building and Oversight, MOCS

A strong board of directors provides a vision for the Executive Director and staff, but also exercises key oversight responsibilities. An effective board requires certain skill sets and diversity, but also an appropriate structure. This training will provide the necessary tools

for the board to effectively carry out the mission of a growing organization. *Targeted to the board of directors and executive directors.*

October

10/4 Best Practices in Internal Controls for Small Nonprofits

9AM-12PM

Faculty: Kelly Mathews, Sr. VP, Council of Community Services of NYS, Inc.
Bryan Epps, Senior Policy Analyst, MOCS

Many small non-profits have limited administrative staff, but work under the same high expectations from funders regarding internal controls. This training will focus on the implementation of simple, yet effective internal controls to allow your organization to reap the benefits of accountability, efficiency, and fraud prevention despite running a lean operation. *Targeted to the board of directors and senior staff*

10/6 Best Practices for Managing a City Contract

9AM-5PM

Faculty: Don Crocker, Executive Director/CEO Support Center for Nonprofit Management
Joanne Page, President, Fortune Society
Gary Selnick, Board member
Jose Mercado, Assistant Commissioner Finance, ACS
Richard Beck, Assistant Commissioner of Payment Services, ACS
John Cirolia, Assistant Commissioner, Contract Agency Finance Division, DYCD
Elisa Velazquez, General Counsel, MOCS
Michelle Biondi, Senior Policy Analyst for Contract Review Unit, MOCS
Bryan Epps, Senior Policy Analyst, MOCS

Managing a City Contract can entail a steep learning curve for a nonprofit organization. Nonprofits may be intimidated by the overall process and must comply with stringent requirements. This course is designed to support organizations by starting with a strategic approach, and covering fiscal management best practices, the structure and general requirements of a City contract, nonprofit perspectives on successfully working with City government, and specific processes like auditing, payment requisitioning (vouchering) and performance evaluations. *Targeted to directors, executive staff and contract managers*

10/20 Best Practices in Volunteer Management

9AM-12PM

Faculty: Dianne Billings Buford, Chief Service Officer

Many nonprofits rely on volunteers to provide essential programs and to engage citizens in service to their community. This workshop will focus on practices that ensure volunteers achieve their goals in service, are inspired to make a long term commitment to your organization and provide a real benefit to your organization. *Open to board of directors and staff*

Vendor Registration

Please register at least 5 business days before the class date.

To register please download, complete and fax a copy of our registration form: <http://www.nyc.gov/html/mocs/html/programs/cbo.shtml> (to obtain the form click on the link "CTC Application" under the heading "Capacity Building Training").

Training sessions are offered at no cost to non-profit organizations that receive grants or contracts from a New York City agency. If you have any further questions or would like to reserve a seat in one or more of these CBO trainings, please contact:

Bryan Epps, Senior Policy Analyst
Office: 212.676.9748
Fax: 212.313.0769

*****Reserve a seat by completing all applicable sections of the attached form***
Please register at least 5 business days before the class date.**

Training Center & Directions

All training sessions are held at the Procurement Training Center operated by the Department for Citywide Administrative Services (DCAS): located at 2 Washington Street New York, NY 10004. For directions, please visit www.hopstop.com.

