

**Middlesex County Center for  
Nonprofit Excellence  
at**



**The Middlesex County Community  
Foundation  
Presents**

## ***Morning Musings***

A series of free workshops for Middlesex County nonprofit staff and volunteers to help build capacity to effectively and efficiently meet their mission.

*Learn ~ Grow ~ Thrive*

**2008/2009  
Fall/Winter Schedule**

## Schedule At A Glance

Building Strategic Relationships with Corporate  
Fundors - Wed. September 10<sup>th</sup>

Growing Your Nonprofit Organization –  
Strategically! – Tues. September 30<sup>th</sup>

Understanding Fiduciary Responsibilities: The Basics  
of Sound Financial Management – Thurs. Oct. 9<sup>th</sup>

Creating a Great Website - Wed. November 5<sup>th</sup>

Moving from Cash Reserves to an Endowment:  
When is a Nonprofit Ready? - Wed. December 10<sup>th</sup>

Bring Your Case to the Capitol: Government  
Advocacy – Fri. January 9<sup>th</sup>

Telling Your Story – Wed. February 4<sup>th</sup>

All workshops are held at  
The Middlesex County Community Foundation  
211 South Main Street  
Middletown, Connecticut.

Be sure to sign up soon, as space is limited.

To register contact Janice Kalkreuth at

[Janice@middlesexcountyCF.org](mailto:Janice@middlesexcountyCF.org) or

call 347-0025.

Wednesday September 10<sup>th</sup>, 9-10am

**Building Strategic Relationships with Corporate Funders**

Funding from local businesses and corporations has become increasingly difficult in the current economy. Learn how to use your time and talents most efficiently when seeking corporate grants and sponsorships. Participants will walk-through key components of a corporate “ask”. In addition, learn how to acknowledge corporate gifts effectively to build a strong working relationship with the corporate community.

Presenter - **Heather Tolley-Bauer** is the owner of **Done on the Run, LLC**, a concierge service helping clients create a life without lists<sup>SM</sup>. Before launching **Done on the Run** in 2006, Heather served as Vice President and Director of Public Relations for Citizens Bank of Connecticut. During her eight-year career, she managed Citizens Bank's internal and external communications. She also planned customer entertainment events, corporate functions, meetings, press events and receptions, planned employee appreciation activities and successfully managed and built Citizens Bank's corporate sponsorship portfolio. An active community volunteer, Tolley-Bauer currently serves on the boards of several local nonprofit organizations.

Tuesday September 30<sup>th</sup>, 9-12am

**Growing Your Nonprofit Organization–  
Strategically!**

Nonprofit organizations typically do not grow symmetrically or strategically. Using FIO Partners Strategic Growth Guide, participants will assess their organization's stage of development and identify opportunities for capacity building. In addition, participants will learn about key success factors for implementing changes within their organization. Join us for lunch after the workshop: Cost \$10

Presenters - **Jane Arsenault and Anne Yurasek** are the owners of **FIO Partners, LLC**. FIO Partners is the exclusive provider of customized consulting services, unique assessment tools, curriculum and training that contribute to the healthy development of nonprofit organizations, foundations, government entities, and those who serve them. Jane has worked in the nonprofit sector since 1977. She has provided consulting support to over 500 health and human services nonprofit organizations. Anne has been an organizational development consultant and trainer for over ten years. Prior to joining FIO Partners, Anne was a Manager in the Human Capital Service Line at Deloitte Consulting in New York City. Anne is also a member of Tri-Town Youth Services Board of Directors.

Thursday Oct 9<sup>th</sup> 9-10 am

**Understanding Fiduciary Responsibilities: The Basics of Sound Financial Management**

Core elements of a nonprofit's ability to fulfill its mission are financial management and understanding the fiduciary responsibilities of board members and senior staff. This workshop will focus on sound fundamentals of financial management and planning, as well as key fiduciary responsibilities.

Presenter: **Cliff Straub** is a Certified Financial Planner <sup>TM</sup> and independent Registered Investment Advisor located in Middletown, Connecticut. He is the President and Principal Advisor of **Lifestyle Financial Strategies, LLC**, a fee-only financial planning and investment advisory practice. Cliff has recently completed his term as Treasurer of the Middlesex United Way and is Vice President of St. Luke's Eldercare Solutions and a member of Rotary International.

Wednesday November 5, 9-10 am

**Creating a Great Website**

What makes a great website? Good navigation? Crisp graphics? Exciting content? In this workshop learn how to use the web to communicate your message, build awareness, increase traffic to your website, boost donations and strengthen relationships with your members, donors and volunteers.

Presenter: **Stephen Shaw** owns and operates **Payson, LLC - Internet Solutions** in East Haddam, a web design and hosting company that manages over 100 sites for small businesses and nonprofits. In addition, he serves of the Board of the Connecticut Sons of the American Revolution which owns and operates the Nathan Hale Schoolhouse in East Haddam.

Wednesday December 10, 9-10 am

**Moving from Cash Reserves to an Endowment:  
When is a Nonprofit Ready?**

Stable organizations require financial resiliency, which is provided by having sufficient cash to weather temporary crises. How much should be kept in cash reserves? When should you start an endowment? This workshop will address the answers to these complex questions including ways to build cash reserves, how to self manage reserves and when to hire professional advisor.

Presenter: **Cliff Straub** is a Certified Financial Planner <sup>TM</sup> and independent Registered Investment Advisor located in Middletown, Connecticut. He is the President and Principal Advisor of **Lifestyle Financial Strategies, LLC**, a fee-only financial planning and investment advisory practice. Cliff has recently completed his term as Treasurer of the Middlesex United Way and is Vice President of St. Luke's Eldercare Solutions and a member of Rotary International.

Friday January 9, 9-10am

**Bring Your Case to the Capitol: Government Advocacy**

Government advocacy is one of the most important tools in creating a sustainable nonprofit organization and this workshop will give you the tools you need to get started. Explore the basics of effective advocacy including: the legal rules of what nonprofits can and can't do, how government decision-making is done in the real world, and how nonprofits can effectively exert influence on government decision making.

Presenter: **Susan Merrow** is currently a lobbyist for the **Connecticut Chapter Sierra Club**. She served for many years as the First Selectwoman of East Haddam and was the Executive Director of Common Cause in Connecticut. She is the author of *One for the Earth: Journal of a Sierra Club President*. She serves on many local Boards of Directors including the Middlesex County Community Foundation.

Wednesday February 4, 9-10am

**Telling Your Story**

Storytelling is a powerful art that can be used to strengthen nonprofit organizations. We're always looking for ways to "get the word out" about what we do and why we do it. One of the most effective methods for demonstrating how we improve lives is a good story. Through this workshop you can improve your communication skills by unlocking the secrets of creating and telling more powerful stories.

Presenter: **Carol Mon** spent 13 years in Human Resources and Payroll and another five in radio and TV before finding her passion for storytelling. She draws on these experiences to help others create and tell the right story. Since beginning her career as a professional storyteller/speaker January 2000 she has told a wide variety of stories to a wide variety of audiences and has delivered dozens of workshops on the power of story in communications.

## About Us

Established in 1997, we are a tax-exempt, not-for-profit, autonomous organization with a collection of endowed funds, whose income is dedicated to improve the lives of people in Middlesex County *in perpetuity*.

Your Community Foundation strengthens the Middlesex County community long into the future by....

- Awarding grants that address emerging and ongoing community needs that improve the quality of life for all of Middlesex County
- Responding to the needs of individual and organizational donors
- Creating a permanent unrestricted endowment

Its two-fold mission is to work with charitably-minded individuals and organizations to build permanent endowments and other charitable funds; and to support local non-profit organizations through effective grantmaking to address community needs. Since its founding, the Community Foundation has provided more than \$1.1 million in grants to more than 150 organizations for the arts, cultural and heritage programs, educational activities, environmental improvements, and for health and human services. *The Community Foundation welcomes conversations with good people who want to do great things.*



MIDDLESEX COUNTY  
COMMUNITY FOUNDATION

*Helping Good People Do Great Things*

Check out our award winning website at

[www.MiddlesexCountyCF.org](http://www.MiddlesexCountyCF.org)

860-347-0025



In Compliance with National Standards  
for U.S. Community Foundations

*The Middlesex County Center for Nonprofit Excellence is  
generously sponsored by  
The Liberty Bank Foundation.*

