

# 42<sup>nd</sup> Annual Nonprofit Organizations Institute

## January 23-24, 2025 • Four Seasons Hotel • Austin, TX

### Thursday Morning, Jan. 23, 2025

	<i>This agenda is still in development. Updates to topics and speakers will be posted as available.</i>
7:30 am	<b>Registration Opens</b> Includes continental breakfast.
8:20 am	<b>Welcoming Remarks</b>
8:30 am 1.25 hrs	<b>View of the Nonprofit Sector</b>
9:45 am 0.75 hr	<b>AI for Tax Exempt Organizations</b>
10:30 am	<b>20-Minute Break</b>

#### CONCURRENT TRACKS

##### TRACK A: Governance and Fiduciary Duties

10:50 am 0.75 hr	<b>Governance, Board Issues and General Fiduciary Duties</b>
11:35 am	<b>5-Minute Break</b>
11:40 am 0.75 hr	<b>Investment Fiduciary Duties and the Prudent Investment Portfolio</b>
12:25 pm	<b>Pick Up Lunch (30-Minutes)</b> Included in registration.

##### TRACK B: Structures for Impact

10:50 am 0.75 hr	<b>Corporate Vehicles and Structures for Impact</b>
11:35 am	<b>5-Minute Break</b>
11:40 am 0.75 hr	<b>Hybrid/Tandem Structuring and Impact Financing</b>

12:25 pm	<b>Pick Up Lunch (30-Minutes)</b> Included in registration.
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**MASTER CLASS A: Understanding Your Governing Documents and Organizational Policies**

10:50 am 1.50 hrs	<b>Understanding Your Governing Documents and Organizational Policies: What they say, What They Don't, and What They Should</b>
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12:25 pm	<b>Pick Up Lunch (30-Minutes)</b> Included in registration.
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**MASTER CLASS B: Advanced Issues in Self-Dealing**

10:50 am 1.50 hrs	<b>Advanced Issues in Self-Dealing</b>
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12:25 pm	<b>Pick Up Lunch (30-Minutes)</b> Included in registration.
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**Thursday Afternoon, Jan. 23, 2025****LUNCHEON PRESENTATION**

12:55 pm 0.75 hr	<b>Disaster Relief</b>
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1:40 pm	<b>15-Minute Break</b>
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1:55 pm 1.00 hr	<b>GC Roundtable</b>
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2:55 pm	<b>20-Minute Break</b>
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**CONCURRENT TRACKS**

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**TRACK C: DAFs / Direct Charitable Activities**

3:15 pm 0.75 hr	<b>Making Sense of the Donor Advised Fund Regulatory Landscape</b>
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4:00 pm	<b>5-Minute Break</b>
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4:05 pm 0.75 hr	<b>Direct Charitable Activities, Recoverable Grants, and Funding Intermediaries and Fiscal Sponsors</b>
4:50 pm	<b>10-Minute Break</b>

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**TRACK D: Private Benefit / Compensation**

3:15 pm 0.75 hr	<b>Illegality, Public Policy, and Private Benefit</b>
4:00 pm	<b>5-Minute Break</b>
4:05 pm 0.75 hr	<b>Compensation and Benefits: Setting, Paying and Disclosing</b>
4:50 pm	<b>10-Minute Break</b>

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**MASTER CLASS C Content Strategy and Branding for Nonprofits**

3:15 pm 1.50 hrs	<b>Content Strategy and Branding for Nonprofits</b>
4:50 pm	<b>10-Minute Break</b>

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**MASTER CLASS D: Private Foundation Grantmaking**

3:15 pm 1.50 hrs	<b>Private Foundation Grantmaking: Agreements, Compliance, Reporting Tools and Provisions for Impact and Measurement</b>
4:50 pm	<b>10-Minute Break</b>
5:00 pm 1.00 hr ethics	<b>Avoiding Fraud and Minimizing Risk</b>
6:00 pm	<b>Adjourn to Networking Reception (6:00 p.m. - 7:00 p.m.)</b> Join us for a networking opportunity with faculty and colleagues.

**Friday Morning, Jan. 24, 2025**

7:30 am	<b>Conference Room Opens</b> Includes continental breakfast.
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8:30 am 1.00 hr	<b>Texas Legislative Update and Navigating the Texas Legislature</b>
9:30 am 1.00 hr	<b>Recent Cases on Targeted/Focused Philanthropy</b>
10:30 am	<b>20-Minute Break</b>

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**CONCURRENT TRACKS**

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**TRACK E: Mergers and Acquisitions / Bankruptcy**

10:50 am 0.75 hr	<b>Merge, Acquire or Dissolve</b>
11:35 am	<b>5-Minute Break</b>
11:40 am 0.75 hr	<b>Bankruptcy in the Nonprofit Context</b>
12:25 pm	<b>Pick Up Lunch (30-Minutes)</b>  Included in registration.

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**TRACK F: Gift Agreements / Fundraising and Co-Venturing**

10:50 am 0.75 hr	<b>Pledges and Gift Agreements</b>
11:35 am	<b>5-Minute Break</b>
11:40 am 0.75 hr	<b>The Nexus Between Charities and Consumer Protection: Fundraising, Lending and Commercial Co-Venturing</b>
12:25 pm	<b>Pick Up Lunch (30-Minutes)</b>  Included in registration.

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**MASTER CLASS E: Post-Election Issues for Nonprofits**

10:50 am 1.50 hrs	<b>Post-Election Issues for Nonprofits: All (or at Least Some) of Your Questions Answered</b>
12:25 pm	<b>Pick Up Lunch (30-Minutes)</b>  Included in registration.

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**MASTER CLASS F: Litigation for Tax-Exempts**

10:50 am 1.50 hrs	<b>Litigation for Tax-Exempts</b>
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12:25 pm

**Pick Up Lunch (30-Minutes)**

Included in registration.

**Friday Afternoon, Jan. 24, 2025**

**LUNCHEON PRESENTATION**

12:55 pm  
0.75 hr

**Measuring Impact and Outcomes**

1:40 pm

**20-Minute Break**

**CONCURRENT TRACKS**

**TRACK G: Social Media / Data Security and Privacy**

2:00 pm  
0.75 hr

**Is Your Social Media Presence Compliant?**

2:45 pm

**5-Minute Break**

2:50 pm  
0.75 hr

**Data Security, Data Protection and Managing a Data Breach**

3:35 pm

**Adjourn**

**TRACK H: Crisis Management / International Activities**

2:00 pm  
0.75 hr

**It's a Crisis: Who to Call and What to Do**

2:45 pm

**5-Minute Break**

2:50 pm  
0.75 hr

**International Activities of Domestic Charities: Issues in the U.S.**

3:35 pm

**Adjourn**

**MASTER CLASS G: The Different Flavors of Employment for Nonprofits**

2:00 pm  
1.50 hrs

**The Different Flavors of Employment for Nonprofits: Offers, Agreements, and Retention Issues**

3:35 pm

**Adjourn**

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**MASTER CLASS H: IP for Tax-Exempts**

2:00 pm  
1.50 hrs

**IP for Tax-Exempts**

3:35 pm

**Adjourn**

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