

42nd 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	Registration Opens Includes continental breakfast.
8:20 am	Welcoming Remarks
8:30 am 1.25 hrs	View of the Nonprofit Sector
9:45 am 0.75 hr	AI for Tax Exempt Organizations
10:30 am	20-Minute Break

CONCURRENT TRACKS

TRACK A: Governance and Fiduciary Duties

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

TRACK B: Structures for Impact

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

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

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

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

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

TRACK C: DAFs / Direct Charitable Activities

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

TRACK D: Private Benefit / Compensation

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

MASTER CLASS C Content Strategy and Branding for Nonprofits

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

MASTER CLASS D: Private Foundation Grantmaking

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

Friday Morning, Jan. 24, 2025

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

CONCURRENT TRACKS

TRACK E: Mergers and Acquisitions / Bankruptcy

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

TRACK F: Gift Agreements / Fundraising and Co-Venturing

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

MASTER CLASS E: Post-Election Issues for Nonprofits

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

MASTER CLASS F: Litigation for Tax-Exempts

10:50 am 1.50 hrs	Litigation for Tax-Exempts
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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

MASTER CLASS H: IP for Tax-Exempts

2:00 pm
1.50 hrs

IP for Tax-Exempts

3:35 pm

Adjourn
