

Joseph B. Diehl CPA JD
Diehl & Co. LLC
8507 Inverness Drive NE, Seattle WA 98115-3934
joseph.diehl@gmail.com or dial (206) 290-5498

Contact my Speaker's Bureau – Susan Guzzetta at SG Speakers
susan@sgspeakers.com

2022-2023 Speaking Topics – 50 Opportunities for a Live/Virtual Conference or Training Opportunities for Your Organization, Agency, Association or Club – Published October 26, 2022

OVERVIEW

Presentations offered range from 30 to 60 minutes – or maybe longer, depending on the scope of the speaking engagement, audience and venue. Some activities involving audience participation, may not be viable for 100% virtual presentations. Fees, expenses – and even course content, are negotiable. Diehl & Co. LLC can tailor any course – and wants to tailor the courses, to meet your needs and your industry. For conference and convention organizers/promoters, many of Joe's topics can be made available as a stand-alone breakout and additional keynote address - all day, over a 2-3 conference/convention days, at a much lower cost per presentation - and for just one flat fee – and only one travel/hotel stipend.

BRIEF BIOGRAPHY

Joseph B. Diehl CPA JD has run a successful Seattle-based association management company and consulting organization for over 25 years. Joe brings over five decades of professional, executive level experience in both the for-profit and nonprofit sectors, beginning at the entry level and eventually becoming an accomplished senior level executive. Joe earned his BS in Accountancy, Northern Illinois University and JD, UIC-John Marshall Law School. His personal mission: to inspire and empower people who share his core values and beliefs. He shares these values and beliefs with others through consulting, event management, speaking engagements and running charity auctions. Other notable achievements: becoming a sport skydiver, running 16 marathons and several ultra-marathons, becoming an ordained minister, competing in the International Auctioneers Competition - and becoming a private pilot. Joe's approach is to combine his life-learning, with research from experts in the subject matter – with a smattering of humor and fun exercises. Joe's longer biography is available upon request.

Personal Growth/Motivational Topics:

1. **Functional Medicine: Healthy Living through Healthy Eating Choices:** Traditional Western medicine addresses symptoms and prescribes medicine developed by “Big Pharma” - while functional medicine addresses the root causes for chronic pain and illness. The US population has grown unfit and unhealthy under SAD – The Standard American Diet. Switching to natural foods, natural remedies and treatments will successfully address – and often reverse, underlying conditions such as type 2 diabetes, obesity, heart conditions, high cholesterol issues and chronic joint pain. Such simple formulas have been around for centuries, but are ignored by the bulk of the medical community. **FOOD IS MEDICINE!**
2. **Success: Attitude is Not Everything – It Is the ONLY Thing.** The top motivational speakers in the world have inspired and motivated us for decades. This course will distill and condense all of the words of wisdom over the ages. The course defines success and seeks to inspire attendees to achieve excellence. This can be fashioned into an all-day workshop which includes exercises and handouts to support the desire to achieve.
3. **Building a Purpose-Driven Life.** Key concepts and legendary quotes which focus on developing a purpose for our life – is drawn from the most popular and inspirational motivational speakers in history. Individuals are encouraged to create their own personal **MISSION** and develop their own set of **CORE VALUES**. Perhaps just as important – they'll learn how to divine their **PURPOSE** in life.

4. Diversity, Equity, Inclusion and Belonging – Why People come to America. Building a diverse and inclusive community within a culture where blatant racism and discrimination have been historically prevalent - is a huge challenge. Following the murder of George Floyd and other minorities at the hands of police, unrest has hit the streets of America. The principles, tips and techniques from the top psychologists and philosophers in history who focus on this topic, are summarized here. The course will broaden perspectives about our fellow human beings and to promote compassionate living as well as exploring the concept of EMPATHY. Joe also promotes the fundamentals of the American dream...
5. Build Your Short-Term Memory – and Exercise Your Brain! As we age, we likely begin to encounter things known as “senior moments” (or brain fog) which are troubling at best and concerning to those who frequently experience gaps in their cognitive ability. This session provides a 3-step approach to better brain health – drawing from the experts, including revolutionary new breakthroughs on neuroplasticity. Science has dispelled the myth that memory loss and cognitive losses are an inevitable result as we age; in fact, cognitive losses have been reversed in many cases.
6. Elder-Speak: Lessons Learned over 73+ Years in the School of Hard Knocks. As a new generation enters the workplace, mentoring has become a way for baby-boomers like Joe to “give back” and help new business professionals to work towards their peak performance in their workplace and in their lives. A veteran of the so-called “school of hard knocks” shares his own experiences including his failures and successes, in a message filled with anecdotes and humor - that every audience will find entertaining and thought-provoking.
7. Peak Performance in a Complex World. Doubling down on the great motivational speakers in the world and promoting the concepts of leading experts on peak performance, Joe provides an overview of the new developments in neuroscience and research that defies belief: which all point to the amazing possibilities of achieving extreme performance improvement. Joe has tested these principles on himself – running both a half- and full-marathon with no traditional distance training whatsoever. The human body is capable of super-human feats. This can be a life-changing experience for those who underestimate human potential.
8. Stand-up Comedy Tips and Techniques: Joe’s sense of humor is legendary. But comedians are not born, they learn what works and what doesn’t work through practice, timing and generating funny material from everyday human behavior. In this interactive training with a small audience preferred, Joe will teach the basics of stand-up comedy from the most successful in the business; and then attendees will take a stab at implementing their own skits and routines. This workshop will test the limits of your creativity and comedic genius, while always relying on what works with the experts and all-time great stand-up comics.
9. Personal Responsibility: It is easy to blame others – or perhaps the economy, or your boss, or a spouse/partner, etc. for your situation in life. From the time when human beings began walking upright, this rule is in effect: if you want something to change, change yourself. A simple start - create goals, choose key core values, and focus on discipline. Then, adopt a “can-do,” positive attitude! It is up to you to change your life – not the economy, nor your boss, nor your spouse or partner. Quit the blame game. You’re wasting valuable time. We’ve only been put on this planet for a short period of time. The clock is ticking. Taking personal responsibility is scary, but will return huge rewards. What is your legacy? How will people remember you – as the complainer who blamed everyone else for their circumstances? Joe reviews the great scholars, motivational speakers and the most successful people in history to convince you – they all did it by taking personal responsibility.
10. Conflict is Good: The best teams in any field – academic, business, and even sports, embrace conflict. In order for a team to progress, every team member needs to weigh in and share their own thoughts and life experiences in the context of the team vs. their own motivations. A methodology has been developed to use conflict as a springboard for a team to achieve great things. Are you bored at every staff meeting? The same “blah blah blah” emanates from both the leaders and the followers? Every true leader knows that conflict, an open mind, listening, finding common ground – and resolving conflict in a collegial way is healthy and helps build collaboration and cooperation. Building TRUST is a key first step. Dealing with conflict will always generate a better solution than being dictated to by those who prefer to dictate! Or just as bad - being in the trap of saying “yes, yes” without making a contribution to the cause (which often generates conflict). Joe will share stories and lead some fun role playing to ensure that your team becomes skilled at achieving greatness.

11. How to Grow a Mighty Pine Tree from a Pine Cone: Joe's YouTube video on this topic is very popular, though being an obscure topic: currently over 11,000 views have been reported. Joe has grown pine trees by harvesting seeds – in a way that mimics nature (our best teacher) versus those who claim to be experts in the field. This is a short course but all the supplies will be provided for your group to start their own small garden for growing a mighty pine tree - and then taking their garden, home. Seedlings are very fragile and it's the exception, not the norm – that a pine tree grows and can thrive for many, many decades. Perhaps we will change the world. We should all do our part. Trees provide the oxygen human beings need to survive. Trees need the carbon dioxide to survive – we exhale carbon dioxide 14-15 times per minute.
12. Develop Your Vocalization Techniques for Public Speaking and Acting Roles. From the classic heavy metal training course called, “The Zen of Screaming” parts 1 and 2 by Melissa Cross, to the octave changes employed by Michael Jackson in many of his most successful King of Pop classics, Joe shares his musical research with you to be the most effective presenter, singer, yodeler or cattle-caller in history. Students will be able to role play and try out their skills at some of these innovative techniques to deliver stunning and memorable presentations.
13. The Basics of Script Writing. It's not just about “formatting” a script, but it's content as well that sells a script to an executive producer or syndicator. Joe will share the keys to developing content that uses human behaviors to trigger emotional reactions from the audiences – which William Shakespeare was best known for and made audiences swoon to his scripts. This training also involves a creative component where students will be asked to write and then direct short productions for the delight of the audiences.
14. Lost in the Forest in the Pacific Northwest: Survival 101! Joe has had the experience of panic that arises when he's gone off the trail inadvertently and has had no way back to civilization; but through these experiences, he's found small, unique steps that a cross country trekker can employ to ensure that he/she will always be safe. This includes training on how to survive below-zero temperatures, avoid a bear mauling and how to forage for food and water. While starting a fire from dry wood in the Pacific Northwest seems impossible, Joe will show what you can take on a hike (other than matches) to ensure you'll always have a warm fire until you find your way out. Who knows; you may never leave the wild once you get comfortable with being lost in a forest...
15. High Intensity Interval Training (HIIT): Benefits for Heart Health. Double-blind studies of individuals with plaque build-up on their arteries had to be halted... some individuals who enrolled to do HIIT training to prove that regimen reduces risk of cardio-related plaque buildup – died during the studies. So they were halted by the medical community. However, the results were stunning and had they been taken to their conclusion, individual with poor, processed-food diets could effectively reduce their arterial plaque and greatly reduce their chances of dying. Joe will ask each person to sign a waiver; and then train each student on how to do HIIT.
16. Goal Setting for Novices. Imagine piloting a boat, without a rudder. What ports-of-call will you get to in that darn boat? None. In order to get to what you want in life, you have to set goals, specific goals. Goal setting separates the 9-to-5'ers from the historically famous entrepreneurs and artists that astound all of us with their performances at work and on the stage. Joe will walk you through the 5 steps of goal setting and each student should be able to set specific goals at the end of this course.
17. (For Adult Audiences Only) Cuss Like a Sailor... or Better Yet, Cuss Like a Chicagoan. Joe was historically known to have that unique skill of cussing in a way that was natural, convincing and impactful. While not intending to promote that behavior, cussing is an art, not a science. Joe teaches you some cultural inflections and regional inflections that can be very powerful to assert a position that you may have or communicate your disdain or unhappiness with another human being – sometimes essential when confronted with an uncomfortable situation. Do not use these skills at home.
18. The Power of “ATTITUDE.” Joe dives deep into his mentor's writings and messages to show the impact that a person's attitude has on their success in life. Earl Nightengale, Jim Rohn, Napoleon Hill and many other motivational speakers knew that ATTITUDE almost always determined a person's success in life. Joe will lead students to examine their own attitudes and guide them on how to make those difficult changes from being a victim to being a superstar.

19. The Healing Power of “VULNERABILITY.” Many of us grew up in households where exuding emotions and feelings was frowned upon by our parents and schoolteachers – and even punished. While this inculcated cultural norm tends to restrict emotional expression and instead, encourages a preoccupation with success, power, and competition – repressing expression of our emotions can result in depression, alcohol/drug use or even worse – suicide. A technique that social scientists use to allow us to express ourselves may appear contrary to reason: vulnerability. We were taught to be stoic and strong, and expressing vulnerability must therefore, be an expression of weakness. Joe uses research studies to prove that expressing our own vulnerability actually allows us to experience more of humanity and to heal from those dictates by others to repress our true feelings. Role playing will be utilized as a learning tool in this subject matter area.
20. The Power of “GRATITUDE.” From the dawn of humanity, a strange and uniquely human trait of gratitude emerged. With it, came power. People who are victims or always blames others for their situation, have difficulty turning that around and realizing that grateful people are powerful people. Joe examines techniques on how to cultivate gratitude and explores the positive impacts that cultivation will have on your life.
21. The Power of “EMPATHY.” Empathy is NOT sympathy. Empathy means, walking in another person’s shoes. Sympathy is feeling sorry for another person’s crummy shoes. To build a lasting relationship with a spouse, business partner or a stranger – empathy will connect you quickly and directly to another person’s heart and mind. Joe teaches ways to portray empathy, but he cannot teach you how to be sincerely interested in another person. He can show you the benefits and help you cultivate your own FUTURE – by embracing empathy.

Business Skills-Building:

22. Conflict Management through Effective Mediation Skills-Building: This course provides techniques and tips on how to resolve disputes and conflicts and includes real-life examples and role-playing by volunteers. Joe’s 50+ years experience in business combined with his law degree and Certificate in Mediation from the University of Washington, provide many actionable steps for those who want to mediate conflicts.
23. A Writer’s Guide to Communicating Professionally: This training covers the basic rules and best practices in becoming a highly effective and highly professional communicator in writing, speaking and e-mailing. First impressions – often observed by others in your first communication, are critical for your credibility and reflects upon you.
24. Networking: How to "Work" a Room and Build Relationships. As business leaders, we are often called to attend conferences, meetings, fundraisers, trade shows and receptions. Studies show that over 90% of us feel uncomfortable entering a room full of strangers! Despite starting off life as an introvert, Joe quickly learned that it was essential to network with others in order to further his career, expand his contacts and ultimately improve his life. Many of these new acquaintances became Joe’s friends, colleagues, employers - and many ended up funding projects for a cause he supported. After "working" hundreds of rooms over many decades, Joe created this course that includes the Dirty Dozen - The Twelve Essential Tips for Successful Networking. Joe uses both personal experiences and research from the experts to encourage his students to comfortably and graciously expand your cadre of supporters and friends!
25. Networking during a Pandemic. Joe’s compares and contrasts his legendary Dirty Dozen (Twelve Tips - see prior bullet point) PRE-pandemic vs. Networking virtually – comparing virtual events only and hybrid (virtual and live combined) events. Many events during the COVID-19 Pandemic are moving from face-to-face meetings to innovative and exciting new ways to deliver content. Networking is STILL important and relevant to your organization and career!
26. Cultivating Resilience: A Guide on Becoming Anti-fragile. Joe examines the research behind resilient people, including public information shared by Professor Nassim Nicholas Taleb and Professor Martin E. P. Seligman. Adjectives like “anti-fragile” and resilient describes people who not only gain from chaos and unexpected, random events (such as economic collapses, terrorist attacks, pandemics, etc.) - but who actually flourish during and after such occurrences. In this lecture, Joe discusses a major component of “Anti-fragile” - the quality that allows some people to be knocked down by life and come back stronger.
27. Strategic Planning. Our Vision for the Future. The strategic planning process creates an actionable roadmap for the future. Whether you are an individual, a family, a sole proprietor, a major for-profit corporation, a nonprofit

organization or NGO, a government agency or a coalition of like-minded leaders – you must have a sail, rudder and a good crew of like-minded individuals to get from where you sit today in the water of life, and your ultimate destination. Joe facilitates on-site retreats from 1-5 days or can conduct a workshop on the essential elements of an effective strategic planning session.

28. Accounting and Finance for non-Accounting Professionals. Reading financial statements and interpreting them may seem like learning a foreign language! It truly is not. Anyone can gain confidence in a very short time. A veteran accounting professional will explain in laymen’s terms, what to look for and how to analyze financial statements and the basic systems used by professional accountants to accumulate and present financial information. Joe shares down-and-dirty analytical tips to get your arms around the numbers.
29. The Basics of Generating Leads. In order for your business to grow, you’ll need to generate leads – new contacts, new customers and find out what your clients need and want. In this course, you’ll find out how to turn on your own version of a contact vacuum cleaner to populate your Salesforce or other software platform with plenty of contacts to share your proposed solutions for their business. We cover cold calling basics from the experts – the high volume sellers who have learned the formula for the successful generation of leads.
30. Converting Generic Training Programs to eLearning Experiences. Many organizations offer a wide variety of live or recorded video trainings to their members or customers. As attention spans shortened and the need for students to absorb complex issues quickly - increased, organizations realized that these approaches were not being effective in educating their target populations. Using technology and human behavioral science, eLearning has become the new approach which not only reduces training cost budgets over time, but provides a long-term source of organizational revenues. Joe shows you the science as well as real life examples of the techniques on how to make this happen for your organization. New, inexpensive modules can add “gamification” to your training platform. Blogs and involving mentors will also be covered.
31. Principles of Generative Learning. Generative Learning was founded by educational psychologist Merlin C. Wittrock, who suggested that new ideas must be integrated through a process - with one’s personal experiences and previously acquired knowledge. Wittrock’s thesis was that learners, in a process of generation, establish relationships between the new information, together with the information a learner already stored in their memory. This presentation provides a roadmap to leaders who want to build a culture of problem solving and thinking “outside the box.” Typically, problems that a team must solve by generative learning, have never been solved before and thus the traditional ways of solving problems – that is, through research, inquiry, interviews or existing case studies, do not apply. Creativity RULES in today’s fast-paced and ever-changing environment and society.
32. The New Board Member’s Guide to Robert’s Rules of Order. US Army Colonel Robert’s purpose in creating his publication, Pocket Manual of Rules of Order for Deliberative Assemblies, was to derive an everyday methodology from existing parliamentary procedure. Since its initial publication in the 1870s, what today is called Robert’s Rules of Order, has been issued in 12 editions with the most current one, issued in 2020. The purpose of this presentation is NOT to make you a Parliamentarian or even an expert in the field; rather, it is to give you a bare-bones grasp on the procedures that take place in a meeting that states it must follow Robert’s Rules of Order. In this training, Joe reviews the basics of virtually every board or association meeting... including such topics such as a quorum, notices, regular v. special meetings, annual meetings, standing rules, adjournment, the call to order, making motions – including motions to amend, motions to postpone indefinitely, motion to limit or extend a debate, motion to lay on the table, motion to suspend the rules – and the intricacies of “seconding” a motion. Joe also covers committee processes and how they report to a governing board, how to address a chairperson “Mr. (or Madame) Chair” – and the unique responsibilities of the Chair, Secretary and Treasurer roles.

33. Facilitated, 2-Day Workshop in Team Building: Using the materials provided by Patrick Lencioni, author of the New York Times bestseller, Five Dysfunctions of a Team, Joe will facilitate a 2 day retreat for your executive staff or your organization's leaders on how to build teamwork. Lencioni has created a model which focuses in on absence of trust, fear of conflict, lack of commitment, avoidance of accountability, and inattention to results as the key impediments to teamwork in the workplace. All materials in this Team Building topic area are subject to copyright laws and must be purchased from Lencioni's organization, The Table Group. Joe uses Lencioni's 291-page Facilitator's Guide, which is constantly being improved and refined by author.
Shorter versions of the course are available. Typically, this topic as a speaking engagement, is not as effective as a facilitated team retreat, however.
34. Unlimited Success - How to Cold-Call. Cold calling and following up on leads may be frustrating for many sales professionals. Top sales professionals implement a variety of tools to fit every situation and every challenge. The tools are infinite in number; and how to build your own toolkit that works for you is the goal of this training. The most successful cold-callers, have 10 essential skills based on empathy, sincerity and kindness - that are taught in this course. Cold-calling is not a science; it is an art!
35. Post-Pandemic Budget Preparation – a Guide for the New Normal: The goal in the midst of any crisis or unpredictable event such as a pandemic – or any black swan event, is to create a realistic and achievable organizational budget. All the rules for budget preparation that were developed for millennia, had to be thrown out the window in 2020. Joe will walk nonprofit financial professionals through the process that necessarily must include revenue and staffing realities in the “New Normal.” For non-accountants, Joe will include a segment on the basics of accounting (or Accounting 101) to ensure attendees fully understand how a budget is created using historic information and the strategic goals of the organization. This course can be a 2 hour presentation and if participation is desired from the audience, this can easily be extended to a 4 hour course.
36. Basics of Financial Literacy: Most of us, even Mr. Diehl himself – learned the hard way about how to effectively manage money and build wealth. However, there are ten basic rules that anyone of any age can follow and live a more abundant life. Joe teaches in layman's terms – the importance of saving and investing; the principles of compounding; buying a home vs. renting an apartment; why credit card debt can keep you poor; what building a net worth looks like in America; what a “side hustle” is and a formula for its success; buying appreciating vs. depreciating assets; how “keeping up with the Jones's next door” could bankrupt you; finding your passion and focusing on becoming excellent at what you do; and the importance of building a library of books that feed your mind and your bottom line.
37. Budget Preparation for Non-Accountants. Having served in a variety of controller and chief financial officer positions - as well as Executive Director of several nonprofits, JOE KNOWS BUDGETS. Those of you who are not accountants need to know what goes into the numbers that you see at a staff meeting and/or board meeting. The numbers can be limits, or can be a guide – or maybe both! You don't have to be a CPA to understand a budget. In fact, most leaders in management are not accountants – making this course an essential one for your success.
38. How to be a Closer: from Generated Leads to Booked Sales - SALES 101! Joe draws from the best and the brightest – and most successful salespersons in history to share the ten basics steps to close a deal. While to the novice, closing the deal may appear to be a formula – it is far from that. The most successful salespersons actually convince the purchaser that they really, really want the product or service. Getting from the first meeting to the closing conference is a long journey, but well worth knowing how the experts do it.
39. The crash course version of Robert's Rules of Order Newly Revised (12th Edition). Joe takes you from a board meeting novice to a knowledgeable director with the layman's training on a very complex topic in a VERY short period of time. This is ideal for your newest board members. Take a look at Item #32 above for more details.

For Nonprofit Professionals:

40. Live or Virtual Charity Auctioneering Services. Diehl & Co. LLC is a licensed and bonded auctioneering company. Joe is a trained, experienced and colorful auctioneer, available to emcee and conduct fun, live auctions at your events and conferences – live or virtual. Only a small percentage on sales known as a “buyers premium” is assessed by Diehl & Co. LLC and all staffing and accounting is provided at no charge.
41. Fund Raising Basics for Nonprofits. This course presents a universe of potential ways for a nonprofit organization to raise funds – from grant writing to crowd sourcing – and everything in-between, including innovative approaches that have emerged in recent years. With the advent of social media and the huge explosion in technology, more opportunities exist for fund raising than ever before. Attendees will share their ideas and what’s worked and what has not worked.
42. Government Program Grant Writing and Program Administration Basics for Nonprofits. While considered a small niche for nonprofits, many long-term benefits will accrue to nonprofit organizations that decide to “take the leap” - operating programs under often complex contracts from US government agencies. The course analyzes the benefits and challenges the initial application to the carrying out of the award – including the rigorous and demanding reporting processes required, and resources required to be successful.
43. How to Run an Event – Start to Finish for Nonprofit Membership Associations and Nonprofit Charities. Running a nonprofit organization’s training, networking or fund-raising events require a higher level of diligence, planning, attention to detail and hard work. This course presents the top tips and techniques from expert professional meeting planners – as well as direct experience running over 175 successful events.
44. Indirect Cost Rate Proposals and Negotiations – the Basics. In order to ensure full recovery of not only direct costs – but indirect costs from contracts with US Federal government agencies, nonprofits should strongly consider proposing the recovery of their actual indirect costs. Indirect costs include such things as accounting, office rent and other administrative expenses – also known as “overhead.” While accepting a voluntary 10% recovery rate can be a viable and easy-to-select option, this choice would put the nonprofit at great financial risk; and requires the nonprofit to raise an extraordinary amount of funds to finance the costs of the office/admin infrastructure needed to manage a major government contract. Instead, proposing and negotiating an Indirect Cost Rate with an agency, while requiring an audit from an independent CPA firm, ensures the nonprofit will be a very successful government agency contractor for many years to come.
45. So... You Want to Become an Auctioneer? This short course is for people who are looking to become an bid-calling auctioneer – a very specialized field that requires licensing and bonding in most states in the US. While we’ve all attended auctions run by volunteers and novices – some of which are painful to experience, Joe has not only graduated from a national auction school, but he’s run a number of charity auctions, become licensed and bonded in the State of Washington, and has competed in the International Auctioneer Competition twice. There are ten basic processes that a budding or aspiring auctioneer should focus upon in order to make a successful and lucrative career selling assets from an estate, handling a neighbor’s garage sale or selling items that are consigned to you for ultimate sale. Joe also can walk you through “online auction” options which are specifically applicable to a post-pandemic world.
46. Keys to Writing an Effective Corporate and Foundation Grant Proposals for Nonprofits: Grant writing can be a frustrating experience for many nonprofits. This course covers both time-saving and effective techniques to succeed in selective targeting and then successfully obtaining grant funding from corporate and foundation grant makers. Joe has raised millions of dollars from the funding community over his career.
47. Fiduciary Responsibilities of a Nonprofit Board of Directors. Joe will explore the various responsibilities taken on by a person who serves on a nonprofit board of directors. Board members are often elected to act on behalf of the organization through a position of trust – thus the word, “fiduciary.” Board members have three main fiduciary duties which will be explored in depth: the duty of care, the duty of loyalty, and the duty of obedience. In the second half of the training, Joe will summarize what distinguishes an Exceptional Board Member from a Good Board Member.

48. How to Make “THE ASK” in Fundraising for Nonprofit Organizations. The most frequent reason for not raising funds for any venture – is failing to make the ASK. The ask is – just that. Asking for money. The fear of failure makes us cautious to ASK, but if the person you are asking is appropriately prepared to understand your WHY and the benefits of their funding your venture, the ASK is just a formality, not some critical decision point. Of course – when they learn about the cause you support, they feel compelled to give. Joe teaches the psychological and sociological underpinnings about making the ASK and why there is no downside in simply saying, “can you help us today?”
49. Building a Better National Association. For decades, major nonprofits that manage large, national associations have built a larger and stronger membership base by creating regional or statewide associations. In this way, local organizations can do the heavy lifting of recruiting members at both the professional and associate (vendor) member level, while providing national benefits to all members – such as educational programs, award programs, newsletters, advocacy in Washington DC and conference events (among other things). Joe will provide real-life examples of organizations that have become powerful in their own right by using the power of local, affiliated organizations to drive growth and revenues.
50. Write Financial Statement Footnotes like a CPA. Now we put the most obscure course as the last one listed. Who among you are Board presidents or Chief Financial Officers – and hire independent Certified Public Accountants to provide an accountant’s report that accompanies your annual financial statements and footnotes? If you’re like most nonprofits, you rely on the CPAs to not only format your financial statements, but also - write all of your footnotes. Yeah, that is what they do. However – and they will explain this to you – these are *YOUR* financial statements and *YOUR* footnotes and require you to sign a statement to that effect. If you’re mystified on the language used by these CPAs, note that by taking ownership of these duties, you can share supplemental data with your constituents and stakeholders that otherwise might be not be required to be disclosed in the financial statements. Learn how to both take the burden off of the CPAs AND take ownership of what you disclose.

(end)