



Mayor's Office of Contract Services
Capacity Building and Oversight
Procurement Training Institute (PTI) Courses
Fall 2009 Semester

September 2009

9/24: Board Development: Oversight and Effective Governance (9AM-12PM)

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

A strong board of directors provides a vision for the Executive Director and staff of a nonprofit, 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 board members and senior staff of NYC nonprofit vendors.*

9/30: Best Practices in Governance and Fiscal Management for Nonprofit Vendors (9AM-5PM)

Faculty: Marcia R. Eisenberg, Director, Nonprofit Nexus - Legal & Fiscal Matters
Ethan Khan CPA, of ERE LLP Accountants & Advisors
Jenny Walty, Assistant Director for Capacity Building and Oversight,
MOCS

This full day workshop is designed to consolidate our half day trainings on Board Development, Internal Controls, Charities Bureau Registration & Compliance, Accounting and Auditing Procedures into a one-stop capacity building training utilizing the resources provided by our expert faculty. This workshop may serve as a refresher for those who previously attended or an introduction for new registrants to our core curriculum. *Targeted to board members and senior staff of NYC vendors.*

October 2009

10/8: New IRS Tax Form 990 (9AM-12PM)

Faculty: Julie L. Floch, CPA, Partner & Director of Nonprofit Services, Eisner LLP
Jenny Walty, Assistant Director for Capacity Building and Oversight,
MOCS
Bryan Epps, CBO Senior Analyst, MOCS

Effective as of the 2008 tax year, Form 990 has been redesigned with major changes in reporting requirements. The new form consists of an 11-page, 11-part core form that is required to be completed by all organizations that file the Form 990 and all applicable schedules. Some information previously required of Form 990 (2007) has been eliminated or revised, meanwhile requiring information not previously reported. This course will highlight all major changes in the new Form 990 such as: governance and compensation of officers, determination of public charity status and public support, and introduction of new schedules. *Targeted to directors, executive staff and fiscal staff of NYC vendors.*

10/8: Internal Controls for Small Nonprofits (1PM-4PM)

Faculty: Kelly Mathews, Sr. VP, Council of Community Services of NYS, Inc.
Jenny Walty, Assistant Director for Capacity Building and Oversight,
MOCS
Bryan Epps, CBO Senior Analyst, MOCS

Many small non-profits have limited administrative staff, but the same 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. *Open to all directors and senior staff of small non-profit NYC vendors.*

10/14: Auditing Procedures for Nonprofits (9AM-12PM)

Faculty: Steven Scicere, Director of Contract Agency Audits, DYCD
Julie Floch, Director of Not-for-Profit Services, Eisner LLP
Jenny Walty, Assistant Director for Capacity Building and Oversight,
MOCS

An organization's ability to meet expected accounting requirements is critical to the contracting process. The City and Contracting Agency must ensure that city funds are spent on authorized expenses and this is accomplished through the auditing process. This course will demonstrate how organizations can successfully prepare for and then navigate the auditing process – independent audits, scheduled audits, fiscal field reviews, and corrective action plans. *Targeted to directors, senior staff and fiscal staff of NYC vendors.*

10/15: How to Manage a City Contract (9AM-12PM)

Faculty: Don Crocker, Executive Director/CEO Support Center for Nonprofit
Management
Teresa Vazquez, Vice-President, Business Development New York City
Economic Development Corporation
Michelle Biondi, Senior Policy Analyst for Contract Review Unit, MOCS
Bryan Epps, Senior Policy Analyst for Capacity Building and Oversight,
MOCS

Managing a City Contract can entail a steep learning curve for a nonprofit organization. Nonprofits must comply with stringent requirements and may be intimidated by the overall process. This course is designed to support organizations with peer learning, a discussion on the financial responsibilities of contracting, nonprofit perspectives on successfully working with city government and some of the resources nonprofit vendors need to be successful. Specifically, the course will cover budget allocation, credit

resources and city contract basics. *Targeted to directors, executive staff and fiscal staff of NYC vendors. transition*

Vendor Registration

******To reserve a seat please complete the attached form in its entirety.******

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, CBO Senior Analyst, at: 212.676.9748 bepps1@cityhall.nyc.gov

Training Center & Directions

All training sessions are held at The Department for Citywide Administrative Services (DCAS) located at 2 Washington Street, 21st Floor, New York, NY 10004. For directions, please visit www.hopstop.com.