

Presentation Catalog

BROMELKAMP COMPANY

INSIGHTS SERIES



To schedule a session or discuss the possibilities please contact Bromelkamp Company:

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WHAT SHOULD YOU EXPECT?

Your Preparation and Promotion

These educational events, whether in-person or via webinar, will be well attended when well promoted. Your organization serves in this key role and as the event manager. Here is what you can expect:

- Define your objectives for putting on this webinar and clarify your success measures
- Manage registrations by email or other methods you use to organize meetings
- Consider charging a fee for the webinar (For example, Bromelkamp Company charges \$130 for a 90-minute training webinar.)
- Send email reminders and follow up thank you and evaluation after the presentation

Bromelkamp Company will consult on techniques for promoting and will provide descriptions of course content for your promotions.

Technology Requirements

For in-person presentation events, we will work through the details of technology set up. For webinar sessions, two technologies are required – a webinar host and a conference “call in” line. Bromelkamp Company can provide this service unless you subscribe to a service that you’d prefer to use and monitor.

Participant Requirements for Webinar

To effectively participate in webinars, all participants will need a computer with internet connection to view the presentation materials with microphone and audio capability or a computer with internet connection and a telephone to dial in for audio participation.

SESSION TOPICS

We have a demonstrated performance record in meeting educational needs. Sessions can be delivered in person or via webinar.

GRANTS MANAGEMENT

DUE DILIGENCE: DON'T ASK APPLICANTS FOR THEIR IRS LETTER!

You are responsible for your foundations grantmaking and thus you owe it to your donors to ensure that you are making grants to reputable nonprofits who are in good standing with the IRS. Are you doing your due diligence? Did you know the IRS itself says the determination letter is not adequate? Are you familiar with the IRS Master File and Pub 78? This discussion will explain:

- Why due diligence is important and what the legal implications are if you don't.
- Why the IRS Master File or Pub 78 are the best means of determining non-profit and charitable status.
- We'll explain revoked status- what is that and why?
- How you can ensure compliance through using GuideStar Charity Check v2.0 or Bromelkamp Company's automatic Pearl/Akoya.net GuideStar Charity Check

You'll hear from experts as they share their experience and stories about the over 300,000 nonprofits who lost their charitable status but still have a copy of their IRS letter. You'll hear about the improvements made to Bromelkamp's automatic process and reporting as well as GuideStar's improved reporting on roll-up of organizations, affiliates, and chapter organizations. Simplify your process and get better results at the same time!

APPLES + ORANGES = FRUIT SALAD? MEASURING OUTCOMES ACROSS DIVERSE PROGRAMS

For decades private and family foundations have chosen an area of interest and then made grants that seek to support like-minded nonprofit organizations with the same interest. More recently funders have been called upon to measure the impact of their grantmaking. They must justify that their grants influenced positive social change. Those grantmaking organizations rely on the data reported from their grantees to convey to their communities and constituents their grantmaking effectiveness. In the workshop you'll assess and analyze the grants you make for completion, quality, effectiveness, and improvement. These measurements come in a variety of shapes and sizes, sometimes compared to goals, and sometimes on schedules. We'll examine how your grants management database can track specific results for individual grants, compare them to goals and timelines, as well as aggregate them across diverse projects and programs to measure the overall impact of your grant making. See the difference one grant makes, and that you're making in your community.

TECHNOLOGY TOOLS FOR GRANTMAKING DUE DILIGENCE

Due diligence is the responsibility of grantmakers to identify potential legal issues around individuals and organizations receiving funding. The 501(c)(3) exemption determination letter provided by public charities is not always proof of tax exempt status. And an April 2005 Gallup Poll found that only 28% of all Americans knew some of the provisions of the USA PATRIOT Act, while 29% knew nothing at all.

Technology Tools for Grantmaking Due Diligence provides a thorough overview of due diligence requirements and explores creative ways of using technology to enhance an organization's ability to check and cross-reference for:

- Compliance with the Patriot Act of 2001, Executive Order 13224, and other laws and regulations that prohibit financial transactions with terrorists
- Confirmation of tax exempt status
- Name matching, identity profiles, charities registrations (some states), history on the customer's account(s) and with peers
- Programmatic fit: is the recipient's program an appropriate fit for your purposes

Key Learning Objectives

- Explore risk assessment, software options for checking anti-terrorism lists, and voluntary best practices guidelines for domestic and internationally active charities
- Capture the correct data to meet due diligence requirements
- Never type the same thing twice
- Identify strengths, limitations, and Catch 22's in your due diligence processes
- Learn time and money saving operations to ensure that you are working your processes--and your processes are not working you

GLOBAL GIVING: INTERNATIONAL GRANTMAKING

Advanced technology in global giving projects provides individuals and organizations with quick access to find and support grassroots social and economic development across the world. But reaching across time zones, language differences, and currencies can be tricky. As a result, the rapid development of international grantmaking poses a unique set of challenges.

Global Giving: International Grantmaking can help prepare an organization for these challenges by providing an overview of best practices and innovations in international grantmaking technology.

Key Learning Objectives

- Examine issues around travel, time zones, and language differences in international giving
- Identify risks in global grantmaking and international currency fluctuations
- Explore communication challenges around telephone, email, and Internet
- Review best practices and innovations in international organizational philanthropy
- Capture the correct data to meet international grantmaking challenges and never type the same thing twice

GRANTMAKING IN COMPLIANCE WITH US ANTI-TERRORISM REQUIREMENTS

Though many government lists require manual list checking to comply with U.S. anti-terrorism requirements, some resources have automated the process. *Grantmaking in Compliance with U.S. Anti-Terrorism Requirements* explores the option of using technology to ensure grantmaking organizations are compliant with anti-terrorism requirements such as:

- Compliance with the Patriot Act of 2001, Executive Order 13224, and other laws and regulations that prohibit financial transactions with terrorists
- Confirmation of tax exempt status
- Name matching, identity profiles, charities registrations (some states), history on the customer's account(s) and with peers

Key Learning Objectives

- Explore risk assessment and software options for checking anti-terrorism lists, and voluntary best practices guidelines for domestic and internationally active charities
- Capture the correct data to make the technology tools effective and ensure compliance with U.S. anti-terrorism requirements
- Never type the same thing twice
- Identify strengths, limitations, and Catch 22's in your grantmaking compliance processes
- Select a programmatic fit: is the recipient's program an appropriate fit for your purposes

ONLINE APPLICATIONS: BEST PRACTICES

Online Applications: Best Practices presents a screen by screen overview of the online grant application process, detailing workflows, cost effectiveness, and other benefits of electronic submissions.

Some organizations are apprehensive about adding online grant application processes because they see them as too risky, high maintenance, or expensive. *Online Applications: Best Practices* offers compelling solutions for these arguments that may help alleviate past doubts and open doors for the future of grant application processes in your organization.

Key Learning Objectives

- Detail the internal and applicant benefits of applying for grants online
- Explore risk assessment, software options, and best practices guidelines for online applications
- Identify built-in electronic screening processes for eligibility and accuracy
- Improve communication by posting follow-up status on review, award, payment schedules, and reports – electronically
- Save time and money by ensuring that you are working your processes – and your processes are not working you

TRENDS IN GRANTMAKERS USE OF THE INTERNET

The Internet has revolutionized the way the world conducts business. Grantmaking is no exception. From detailed electronic grant applications to fundraising and database integration with third party vendors, efficient use of Internet grantmaking technology can make or break an organization.

The key to success is integration and making vital links between what appear to be unrelated workflows. Everything is connected. And *Trends in Grantmakers' Use of the Internet* uncovers hidden links, revealing a wide spectrum of possibility in the use of technology and the Internet for grantmakers. The class will explore the Internet and grantmaking in relation to:

- Connections between the desktop and the Web
- Third party data sources
- Direct links from a grantmaking database
- Multiple and off-site remote access
- Compliance with U.S. Patriot Act
- Database integration and viewing shared information online

Key Learning Objectives

- Boost confidence in your organization's ability to use technology and the Internet as a means of improving workflows and achieving your mission
- Investigate integrated grantmaking technologies for applications, notifications, reporting, and evaluation
- Examine options for Web importing into existing databases
- Identify Internet benefits for grantmakers and applicants
- Answer the question, "What is database integration?"

MANAGING SCHOLARSHIPS ONLINE

Managing Scholarships Online is a course designed to canvass the wide range of opportunities available for grantmakers to turn reams of paper into real cache value. The result is added savings, increased resource availability, and exceptional accuracy in all grantmaking processes.

The class will lay out in detail the advantages in cost effectiveness and benefits to staff, committees, and scholarship applicants, when choosing electronic applications over old style, paper workflows.

Key Learning Objectives

- Compare detailed cost savings between paper processes and online grant applications
- Explore common concerns around security, costs, and volume when using online scholarship applications
- Identify benefits to organizational staff in time, scheduling, and security
- Discover expedient connections and processes between grantmaking committees and grant recipients when using online applications

- Investigate how integrated electronic grantmaking technologies for applications, notifications, reporting, and evaluation enhance the grantmaking experience for all parties involved

DECENTRALIZED: LOCAL DECISION MAKING WITH CENTRALIZED REPORTING

Corporate foundations and giving programs walk a precarious tightrope. How can they accomplish the most at the local level, keep regional units involved in their communities, and still meet corporate priorities and legal requirements? Decentralizing through technology is one solution that can simplify local grantmaking while maintaining a centralized grants management database at the hub.

The process evolves from paper to electronic via an Intranet or Internet site, increasing accuracy and saving time. But the real progress in decentralizing grant decisions to the storefront level is in the increase in personal contact, adding value beyond the contribution itself. Applicants engage team members face to face about community issues; accomplishments increase when people get together and listen.

Decentralized: Local Decision Making with Centralized Reporting explores the professional and community benefits of a paperless electronic giving program and includes information on:

- Online applications and screening through the Internet
- Geographic electronic forwarding to regional, unit, and national managers for evaluation, approval, and comment
- Electronic record keeping, notification, and payment with electronic signatures
- Public and managerial electronic access to grant award information

Key Learning Objectives

- Create a central core database to increase time for personal contact, enhancing local decision making
- Internet and Intranet web sites to collect and disseminate contributions and matching gifts
- Streamline methods of meeting legal and programmatic requirements
- Maximize dollars and avoid duplicate efforts. Never type the same thing twice.
- Explore workflows where every step in the process is electronic – including consolidated reports and a system available anytime, anywhere
- Compare detailed cost savings between paper processes and online grant applications

FUND ACCOUNTING & INVESTMENTS

FOUR THINGS TO TEACH YOUR ACCOUNTANT

Are you spending too much time calculating fund fees? Are you confident in the accuracy of your investment allocation? Is your accountant able to produce up to date and correct fund balances at a moment's notice? While there are lots of people familiar with nonprofit accounting, finding or developing expertise in fund accounting in a community foundation can be a lot more elusive. Whether you are an Executive Director, CEO, CFO or a contracted accountant you should understand these four unique but essential financial functions of a Community Foundation. By attending this seminar you will increase your understanding of your financial policies, why they exist and how you can ensure they are followed. In an easy to understand format you'll learn why these four essential functions are necessary and how you can ensure their accuracy no matter what software you use or who is completing the work:

- Joint Investment Allocation
- Fund Administrative Fees
- Spendable Allotment
- Rebalancing Funds

Come join us for a non-technical look at the concepts and options behind these four essential functions, invite your accountant to join us. Whether or not you or your accountant has a lot of community foundation experience, it's still your responsibility to understand the effects of your policies. You might find it helpful to brush up on your current allocation and spending policies and fee structures beforehand. Better yet, send them to Henry if you'd like to benefit as a case study. We'll discuss how your policies can add flexibility for your donors or more beneficial or easier for you, whether you use FIMS, Community Pearl, Excel spreadsheets, or other accounting software. No snoozing.

SHOOT, *READY*, AIM! - ARE YOUR INVESTMENTS MISSING THE TARGET?

Maybe your foundation has its money in a safe place: whew. Maybe your foundation is always spotting a hot investment opportunity: let's grab it! If you don't do planning, there will always be inefficiencies, missteps, or even imprudent decisions. Investing the foundation's money depends on a well-written investment policy, which results in more focused results, clearer roles, and measurable outcomes. Law requires you to be prudent investors. Learn some best practices to plan and implement your investment policy: local partnerships, diversification of investment advisors. Investments are supposed to support the purpose of the organization. It's all about growing your investments with responsible stewardship. Feel free to contact the presenters before the conference with situations that might be good (anonymous) case studies for the discussion.

FUNDRAISING

USING TECHNOLOGY TO ENHANCE CORPORATE CONTRIBUTIONS

Technology is the single common thread running through all of an organization's daily processes, record keeping, and research. Using *Technology to Enhance Corporate Contributions* explores ways to generate and maximize contributions by streamlining and weaving technology through Customer Relationship Management (CRM), contribution seeking, volunteer tracking, and fundraising.

Everything is connected. But the only creative element in a system is the human – the human is connected to everything.

“When we try to pick out anything by itself, we find it hitched to everything else in the Universe.”

- John Muir, 1911, *My First Summer in the Sierra*

Key Learning Objectives

- Develop ways to connect technology to the human side of your organization saving time, money, and energy
- Investigate the importance of communication and the Web
- Explore smart strategies for choosing processes and software to fit your needs
- Identify how to select the right recipients
- Analyze why and when it pays to outsource
- Learn how positive recognition with a strong emphasis on community benefit and service enhances contributions

WEB FUNDRAISING AND CHOOSING SOFTWARE

Is it true that people give more online than with conventional fundraising techniques? How do you evaluate if web fundraising is right for your organization? What should you consider when choosing a fundraising method? Is there any advantage to purchasing software over paying for a hosted service?

These are some of the questions that are addressed in *Web Fundraising and Choosing Software*.

Applying the right fundraising solution not only increases your organization's ability to generate funding, but heightens visibility and strengthens the capacity to serve your mission and give back to the community.

From accounting to contributions to volunteer tracking – everything is connected.

Key Learning Objectives

- Explore advantages and disadvantages of available fundraising methods, including:
 - Conventional fundraising
 - Fundraising software

- ASP (Application Service Providers)
- Weigh internal and donor considerations such as branding, costs, security, and support
- Investigate options for improving the synergy between fundraising, relationship management, and gift tracking
- Capture the correct data so that you never type the same thing twice

TECHNOLOGY

A WEBINAR ON HOW TO GIVE A WEBINAR

Webinars offer organizations dynamic, timesaving tools that focus on the efficient exchange of information — often in real time — for brainstorming, prioritizing, and planning activities that drive decisions.

A Webinar on How to Give a Webinar explores simple and cost effective electronic communication techniques for organizations that have clients or members spread across multiple locations and limited budget for travel.

Key Learning Objectives

- Exchange and document vital information uniformly and quickly to diverse interest groups
- Promote a reputation for innovation by giving interactive live demonstrations that engage attendees
- Reduce travel by electronically pooling resources and offering equal access to geographically dispersed members
- Foster a more collaborative environment while achieving cost savings and increased productivity

USING TECHNOLOGY IN YOUR FOUNDATION

Technology is the backbone of a thriving organization. Proficient and effective use of technology keeps the heart of an organization – its people – running efficiently and strongly.

When it comes to technology, you have to spend time to save time. In the long run, an investment in intelligent use of technology frees an organization to focus on brainstorming, prioritizing, and planning activities that move its mission forward.

Using Technology in Your Foundation is time well spent. The course explores creative ways of utilizing technology to enhance an organization's ability to:

- Collect accurate information
- Adapt recordkeeping to changing needs
- Maximize resources
- Streamline workflows

- Communicate with stakeholders

Key Learning Objectives

- Explore software options that reduce data entry and increase accountability
- Capture the correct data to maximize workflow efficiency
- Never type the same thing twice
- Relay accurate information and communicate with stakeholders, direct from the source
- Identify strengths, limitations, and Catch 22's in your technology processes
- Learn ways to use technology that free more time for personal contact with clients
-

CHOOSING SOFTWARE: WHAT TO PREPARE AND TELL VENDORS

Choosing the right software is one of the most important decisions an organization can make. Think about the individual considerations and challenges of selecting software for yourself or your family - then multiply by 20, 50, or 100. Complexities increase with the number of people using the software and the dollar amount invested.

Choosing Software presents a wide range of tools designed to assist in making the right software choices for your organization. The course begins by outlining how well-designed software can streamline organizational workflows from accounting to volunteer tracking, and ends with detailed information about costs, shopping for vendors, installation, and support.

Key Learning Objectives

- Explore the wider organizational benefits of right software choices
- Detail the reciprocal relationship between software and streamlining workflows such as document management, communication, grants management, budgets, and accounting
- Learn how the right software can improve the Three A's – Accuracy, Accountability, Adaptability
- Identify practical aspects of purchasing software – vendors, cost savings, installation, data conversion, maintenance, and support
- Be aware of the Do's and Don'ts of choosing the right software
- Remember – you are not purchasing a file cabinet. You're beginning a long-term relationship with a business partner

COMMUNICATING WITH YOUR STAKEHOLDERS ONLINE

What methods are you using to communicate with stakeholders and are they keeping up with current technology? How long has it been since you accessed and updated the growing list of stakeholders in your organization? How do you measure stakeholder contributions in serving your mission and helping you move your organization forward?

Communicating with Your Stakeholders Online is a class designed to help you explore compelling methods of evaluating and communicating with stakeholders using technology and the Internet in key areas such as:

- Public and press contact
- Telecommuting
- Routine communication
- Remote access to internal database
- Outside database connections
- Contact between recipients and decision makers

Key Learning Objectives

- Explore alternate communication methods such as VOIP (Voice Over IP), IRS databases, terminal servers, electronic applications and reports
- Identify key stakeholders in the organization by reevaluating current stakeholders, adding to the list, or letting go of those who no longer serve your mission
- Connect your database to key stakeholders, both internal and external
- Create engaging and efficient communication workflows using technology and the Internet
- Capture the correct data to integrate Internet communication technology as an effective tool for your organization

FUTURE OF TECHNOLOGY IN PHILANTHROPY

The future of philanthropy is as far-reaching as the visionaries, donors, and advocates who contribute to its success. Human generosity is a key element, the élan vital. But it is the foundations that provide critical structure, ensure that charitable donations reach the right recipients, and keep the wheels of philanthropy progressing forward.

Strong foundations are built on solid structures. One of the keystones to creating a dependable, proficient organization is technology. Technology has changed the face of philanthropy.

Future of Technology in Philanthropy offers a fresh look at how new structures in philanthropy have changed the way foundations operate. The class telescopes wide angle to detail, traversing philanthropic cultural changes such as “for-profit” foundations like Google or the deep pockets of baby boomers, and lands on the day to day use of technology for recordkeeping, process automation, and knowledge management.

Where will philanthropy be in October, 2020? Here comes the future. Are you ready for it?

Key Learning Objectives

- Detail technological innovations in philanthropy, present and future
- Illuminate the changing face of philanthropy and the impact to foundations, including cultural variances as a result of technology
- Identify the benefits of technology to foundations in costs, time, recordkeeping, process automation, and knowledge management
- Simplify and facilitate connections between donors, grantmaking committees, and grant recipients when using automated processes and software

- Investigate how integrated electronic grantmaking technologies for applications, notifications, reporting, and evaluation enhance the grantmaking experience for all
- Move philanthropy into the future allowing foundations to focus on vision and mission

ABOUT HENRY A. BROMELKAMP

Henry A. Bromelkamp



Henry A. Bromelkamp, president of Bromelkamp Company LLC is well known among grant making foundations. He was a visionary when he created a software database to track grants for a non-profit organization. He has taken this vision forward to develop the most integrated and flexible grants management software solutions on the market today.

Henry continues to lead Bromelkamp Company growth with both installed and online software solutions. He shares his in-depth knowledge of foundation technology by consulting with clients, presenting webinars and training sessions, and speaking at conferences to help foundations effectively manage their grant making processes.

A strong believer in philanthropy, Henry travels annually to Africa as an Ambassador for Books for Africa, Africa Classroom Connection and Action for Children Zambia. He volunteers at St. Stevens Human Services, participates on three boards of directors and is a Rotary member. He also established Bromelkamp Foundation to provide funding for non-profit organizations that support literacy and address homelessness.

When Henry is not busy leading Bromelkamp Company LLC and supporting charitable causes, he can be found either renovating his historic stone and brick Victorian house or keeping active by running, biking, drawing, singing and traveling. You can reach him at henry@bromelkamp.com.

ABOUT BROMELKAMP COMPANY

Bromelkamp Company LLC is a leading provider of integrated and online grant management software solutions. Its inspired design meets dynamic technology to provide installed and online software that effectively manages the entire grant management process for foundations. Find out more at: www.bromelkamp.com or call 888/290-9087.

