

Expert Listing 2010

Are You Really Protecting Your Board and Volunteers?

As professional insurance advisors, we want to do more than sell insurance. We strive to understand each non-profit's specific needs and offer sound solutions. Being an independent insurance agency, we can offer our clients access to policies from the best insurance companies represented in our community. We think you'll find our recommendations to be comprehensive, sound and competitively priced. Our goal is simple - "to be recognized throughout Southwest Washington as the agency of choice for insurance products and services for non-profit organizations serving our community". Our clients can depend on the quality of our products, agents and staff. Our reputation is our calling card. We have been serving local non-profits for the past 20 years. We want our non-profit clients to focus on their mission and the things that matter. We'll handle the insurance.

Tara Yanak,
Davidson Insurance
360.514.9550

bruce@davidsoninsurance.com
www.davidsoninsurance.com

Charitable Contributions: Diverse vehicles same path

Are you looking for charitable donations? Are you aware of the different vehicles that you as a donor can use to donate to the organization or non-profit of your choice? We can help educate you as well as your donors to the options that are available. We offer seminars or one-on-one consultations. Some of the areas include: Making the charity the beneficiary of a Retirement plan or IRA, Life Insurance, Property, Trust. Let us introduce ourselves; we are Angela Dockum and Chris Finck with Waddell & Reed. Waddell & Reed has been helping individuals, families, businesses and organizations make better financial decisions since 1937. As Financial Advisors we strive to make a difference in the lives of our clients by helping them obtain their financial goals. We do this through comprehensive financial planning to include: Risk management, Budgeting Education plans, Retirement planning, Estate planning. It's about creating a plan that is right for you and helping you achieve your financial goals.

Angela Dockum and Chris Finck,
Waddell & Reed
360.694.1266

adockum@wradvisors.com
cfinck@wradvisors.com
www.finckandwhite.wrfa.com

Engaging Your Board for Effective Fundraising

Elizabeth Asahi Sato, President/ CEO Rise to Excellence will facilitate a roundtable on why engaging your Board of Directors /Advisory Boards is critical to the Fundraising process. If you have questions come join the discussion, if you have knowledge and practical experience we invite you to participate in this lively discussion sharing our mutual expertise. Elizabeth has three decades of practical experience in the nonprofit sector and has been recognized regionally and nationally for her leadership and commitment to nonprofit organizations. She founded this unique local consultancy firm that purposes to guide entrepreneurs, emerging Businesses, nonprofit organizations and ministries to embrace organizational "best practices" and encourages organizational excellence. Rise to Excellence provides focused consultancy services for nonprofits large and small, private and public Boards and local or national ministries.

Elizabeth Asahi Sato,
Rise to Excellence
360.907.3784

Elizabeth@risetoexcellence.com
www.Risetoexcellence.com

Engaging Youth in Your Organization

Provide training and resources for Senior Project design, Youth-Adult Partnerships; Family Service, and Service-Learning Partnership development. Coordinated a service-learning program that annually engaged 1800 middle school students in partnership with 40 nonprofit and civic organizations. Received the National Service-Learning Practitioner Award and the Case Foundation's Make It Your Own Award

Kate McPherson,
Project Service Leadership
Business Phone: **360.609.1453**
mcperson@pacifier.com
www.projectserviceleadership.org

Event Planning

Courtney Givens is a Certified Event Planner and owner/founder of simple pleasures events. She created the company 12 years ago and has built her reputation around fundraising for the non-profit sector and corporate events with clients including the Vancouver Business Journal and the Oregon Republican Party. Her background enables her clients to benefit from both her experience in the development and coordination of planning of an event and consulting of personnel when putting on an event of any size and caliber.

Courtney Givens,
Simple Pleasures Events
360.909.5632
courtney@
simplepleasuresevents.com
www.simplepleasuresevents.com

Firing a Volunteer: Retire, remove, redirect

Nancy is a Certified Volunteer Administrator with over 20 years of experience in the field in positions ranging from Executive Director to Volunteer Resources Manager. She is now a trainer and consultant in the field.

Nancy Gaston,
Gifts Differing
Business Phone: **360.574.0984**
nancyg57@comcast.net

Fundraising

ACCG offers consulting services to nonprofit organizations. The firm has over thirty year experience with nonprofits in all roles including development director, executive director, board member, volunteer and consultant. Responsible for raising over \$100 million for annual and capital campaigns.

**Jonathan Abramson and
Randa Cleaves, Partners**
ACCG: avenue2possibilities LLP
360.597.4655
contact@accga2p.com
www.accga2p.com

Hot Auctions Tips

Tofino Auctions™ fundraising event managers specializing in Web-based software to help non-profit organizations plan, manage and run gala auctions, online auctions, and other fundraising events.

Roger Devine, Tofino Auctions
503.913.4407
roger@tofinauctions.com
www.tofinauctions.com
www.schoolauction.com

Managing Staff, Volunteers, Boards

We are a company that works with individuals and groups of 2 to 200+ throughout the U.S. who want to thrive by developing skills in effective communication, working strategies, and creating a stronger sense of team cohesiveness. We have worked with local, state and federal government, schools, non-profit organizations, corporations and healthcare. We have coached and mediated government executives, school administrators, teachers, and non-profit executive directors.

Megara Kastner, Ph.D,
Collaborative Group Dynamics
Business Phone: **360.735.1767**
megara@collabgroups.com
Website: **www.collabgroups.com**

Nonprofits and Healthcare Reform: What Happens Now?

Tino Versoza has worked in health insurance and benefits both on the carrier and brokerage side. His expertise is with nonprofits, legislation and compliance and is recognized by many in the marketplace. Additionally, Tino leads Heffernan's benefits division for the Pacific Northwest. His expertise and 10+ years experience has helped many organizations save money and plan for the future.

Tino Versoza,
Heffernan Insurance Brokers
Direct: **503.419.5792**
tinov@HeffINS.com

Nonprofits and Human Resources

Barrett Business Services, Inc. (BBSI) is a human resources management company that offers a comprehensive range of human resource management services to assist small and mid-sized businesses in managing the increasing costs and complexities of employment-related issues. BBSI's principal services include Professional Employer Organization (PEO) services, staffing, and payroll processing. BBSI's platform of outsourced human resource management services is built upon its expertise in human capital management, risk management and workplace safety programs, workers' compensation coverage and administration, payroll processing, and employee benefits and administration. In addition to serving customers in Southwest Washington, BBSI operates 59 locations throughout the United States, most of which are concentrated in the West. The Company's customer base includes primarily small to mid-sized businesses in multiple industries, including the non-profit sector.

Heather Wiswall
**Corporate Director of
HR Services**
Sandy Manicke,
**Senior HR Consultant from
BBSI's Portland branch**
Barrett Business Services, Inc.
(BBSI)
Corporate Office
Vancouver, WA 98662
800.494.5669