

## **TRAINING PROGRAM EXPECTATIONS**

Contractor will develop and implement a comprehensive training program to provide professional governance, financial, and general corporate management training to nonprofit and charity boards, executive directors, and members.

### **Curriculum Topics**

Contractor will be expected to develop and provide trainings on all of the following topics for nonprofit corporation and/or charity boards:

- Fiduciary and legal responsibilities, including:
  - Conflicts of interest
  - Assuring business is transacting legally
  - Protecting assets
  
- How to be a high performance board, including:
  - Responsibilities
  - Maximizing performance and contributions
  - Recruiting board members
  - Principles
  - Developing a resource library
  
- Financial controls, including:
  - Accounting principles
  - Accountability and transparency
  - Policies and procedures needed
  
- State compliance issues, including:
  - How to start a nonprofit corporation
  - How to maintain a nonprofit corporation
  - When to register as a charitable organization
  - Charities filing requirements and required disclosures
  - Maintenance of the organic record
  - Business licensing services
  - Compliance with Washington State Department of Revenue
  - Compliance with Washington State Gambling Commission
  - Compliance with Washington State Liquor and Cannabis Board
  
- Federal compliance issues, including:
  - Establishing federal status with the Internal Revenue Service
  - Applying for federal Employer Identification Number
  - Applying for tax-exempt status
  - Forms required
  - Annual filing and disclosures requirements
  
- How to dissolve a nonprofit corporation, including:
  - Legal documents and requirements
  - Requirements under the Charitable Solicitation Act

## **Training Criteria**

Trainings should meet the following criteria:

- 50% of the trainings each year should be in-person trainings.
- 20% of the trainings each year should be half-day workshops.
- 15% of the trainings each year should be full-day trainings.
- 15% of the trainings each year should be webinars.
- At least 30 trainings should be completed by June 30, 2018.
- At least 45 trainings should be completed between July 1, 2018, and June 30, 2019.
- Trainings, including in-person trainings, should be offered throughout the State, including rural areas.
- Participants may be charged a nominal fee (not to exceed \$20 per participant), payable to the Contractor.

## **Documentation**

Contractor will be expected to provide OSOS documentation regularly, including the following:

- Reports on the number and type of trainings completed, and information about attendees.
- Training and survey results.

## **Other Duties**

Contractor will be expected to perform other duties including:

- Administering monthly surveys for in-person trainings.
- Planning and organizing trainings.
- Advertising trainings and making training information available to OSOS to post on training page of OSOS website.
- Preparing and printing materials.
- Collaborating with OSOS on surveys and curriculum for future educational needs.