

CONFERENCE

**Not-For-Profit:  
Be Empowered  
through Knowledge**

This is your chance to hear the  
latest in ideas, opportunities and  
strategies in the NFP sector



Friday 29 May 2015

Collins & Co invites the Governing Board Members and Management of NFPs to come on a journey with our speakers and learn from their practical approach to their specialist topics.

Can you afford to miss such a rare opportunity to learn from the experts in their field?

### Not-For-Profit: Be Empowered through Knowledge

- Date** Friday 29 May 2015
- Time** 8:45am to 4:30pm (registration from 8.15am)
- Venue** Pullman Albert Park  
65 Queens Road  
Albert Park
- Parking** All day parking is available at the Pullman for \$15

*Morning tea, lunch and afternoon tea provided*

- Topics** Please see event program opposite
- Speakers** Please see speaker biographies overleaf
- Cost** \$100  
Early bird until Friday 8 May 2015 – \$80
- RSVP** Please complete and return the event booking form by **Wednesday 20 May 2015**

# Event program

8:45am – 8:55am

**Speaker** Paul Kelly, *Partner Collins & Co*

## Introduction of Event and Speakers

8:55am – 9:45am

**Speaker** Derek Mortimer

### The NFP board, the members, and their respective roles

*The board admits new members, but members appoint the board; avoiding a co-dependent relationship*

- What is the role of a committee and its members
- Criteria for the selection and recruitment of board and committee members
- Understanding your role as a director or committee member.

9:45am – 10:15am

**Speaker** Ann Watson

### Leadership Response to Innovation

Innovation is defined as “People implementing ideas that add value”. This session will discuss:

- The innate nature of innovation in an organisation – is it worth consideration?
- The stages of Innovation Performance
- The range of responses and resources a leader may employ to manage the situation.

10:15am – 11:00am

**Speaker** Troy Armstrong

### Maximising the Investment Opportunities for NFP organisations

- Why invest?
- Investment – Getting the right balance
- Key issues and concerns.

11:00am – 11:15am

**Morning tea**

11:15am – 11:40am

**Speaker** Ryk Eksteen

### Understanding Financial Statements in a Nut Shell

This session will demystify the complexities of the financial statements of a NFP organisation for the uninitiated.

11:40am – 12:10pm

**Speaker** Maria Stavrakis

**6 tips to delivering an engaging brand strategy for not-for-profits**

The session will give you an opportunity to analyse your organisation as a brand, how you connect with your target audience, what motivates their buying behaviour and how to stay in their minds and hearts. This will create the fundamentals of a strong brand strategy that you can then use to create effective marketing collateral that is strategic and purposeful.

12:10pm – 12:40pm

**Speaker** Kate Hamer

**Introduction to brand protection and intellectual property (IP)**

Most have heard of brand protection and IP but few understand what makes a good brand and how the right IP can enhance the value and reputation of an organisation. This presentation will cover the foundations of IP, discuss what makes a good brand, and dispel some common myths around trade marks and copyright. The aim of this morning's session is to prepare you for the next session, where we will discuss key IP issues non-profit organisations most commonly face.

12:40pm – 1:20pm

**Networking Lunch**

1:20pm – 1:50pm

**Speaker** Kate Hamer

**The most common IP issues for non-profits**

There are common IP issues that arise in the non-profit sector. During this session, we will discuss these issues in detail and highlight some of the key strategies that can be implemented to overcome them. The purpose of this session is to help you to identify these issues before they arise and to start thinking about smart, sensible and cost effective strategies to protect your organisation.

1:50pm – 2:20pm

**Speaker** Robyn England

**Project Management in the NFP Environment**

- What Project Management is, and what it's not - some common misconceptions
- How project methodology uses lessons learned
- Key terms used in Project Management - translating them into language common to the NFP industry
- What benefits Project Management can deliver to the NFP sector
- Practical hints and tips to get you started with using project principles in your organisation.

2:20pm – 2:50pm

**Speaker** Ann Watson

### Team Building – Is it a Left or Right Brain Process?

The vision is clear, the business plan has been written and then...

- Competent staff are essential for successful implementation
- The keystone to any team is the leader/manager
- Converting project tasks into job descriptions
- Interviewing and selection
- Profiling candidates and their match to the job description
- How will each candidate affect the team culture
- The NBI Thinking Profiling system and its usefulness in assessing the quality, suitability and vulnerability of any team.

2:50pm – 3:20pm

**Speaker** Derek Mortimer

### Settling NFP internal disputes effectively

*Structured conversations, not confrontations*

- Dispute resolution - what are the options, how to avoid being ambushed.
- Failures of governance: the justiciable and emotional dynamic
- Case study: aggrieved members and rogue directors
- Traps and strategies
- Being business like: cutting losses and achievable outcomes

3:20pm – 3:35pm

**Afternoon tea**

3:35pm – 4:00pm

**Speaker** Ryk Eksteen/Derek Mortimer

### The Key Responsibilities of a Treasurer

Strong governance and good financial management are essential to the strength and sustainability of every not-for-profit.

This session will discuss the Treasurer's legal and other key responsibilities.

4:00pm – 4:20pm

**Speaker** Ryk Eksteen

### Handy Tips from the Auditor

This is an opportunity to learn first hand about the common mistakes and issues an auditor may find during the audit of a NFP organisation and why fixing these issues are important.

4:20pm – 4:30pm

**Speaker** Paul Kelly, *Partner Collins & Co*

### Closing remarks

## Speakers

### Derek Mortimer



t 03 9370 9333  
[dfmortimer.com.au](http://dfmortimer.com.au)

#### Principal, DF Mortimer & Associates

Derek's firm is a Melbourne based boutique law firm practising exclusively in not-for-profit and charity law. His clients include private and public charitable foundations, trader associations, and religious institutions.

In 2006 Derek advised and prepared for public consultation, the Fundraising Institute Australia code of ethics and professional conduct and the fundraising complaints process. This process is now recognised by the Senate Standing Committee of Economics as a way not-for-profit organisations can maintain their reputation with the Australian public.

Derek has a reputation for assisting the resolution of internal grievances within not-for-profit organisations. He also advises on establishment of not-for-profit entities and applications for tax concessions and deductibility with the Australian Charities and Not-for-profits Commission.

Derek has a Bachelor of Law, Grad Dip Legal Prac., and Grad Cert Dispute Res. He is admitted to practice in the Supreme Courts of NSW and Victoria. He is chair of the Law Institute Victoria Charity and Not-for-profit Law working group.

**DF** Mortimer  
& Associates

## Ann Watson



### Entrepreneur Whisperer

Ann is an experienced coach and facilitator, building on over 25 years of experience, doing all things from financial administration to being a Director in what became a multi-million dollar family manufacturing business. Eventually she realized that her core motivation is motivating people, and thus began a new career in coaching, where she completed training in Life Coaching, Neuro-Linguistic Programming and Training & Assessment to be accredited by the International Coaching Federation.

t 0430 442 260

Ann operates two coaching services: B There – focusing on individuals; and Entrepreneur Whisperer – focusing on businesses.

In helping businesses, including with her BAS Agent qualifications, Ann often works as a virtual CFO – building better businesses from the inside out.



## Troy Armstrong



### Financial Adviser, CollinsCo Wealth Management

As a Collins Co Wealth Management Financial Advisor, Troy Armstrong holds an Advanced Diploma in Financial services (Financial Planning), is qualified with Margin Lending and Geared Investment and Self-Managed Superannuation Fund products from Kaplan Professional.

His core business is the provision and implementation of strategic advice to deliver sound financial outcomes providing specialist advice in the areas of superannuation and retirement planning, wealth creation and protection. Joining Collins Co Wealth Management in 2014, Troy has quickly developed a loyal clientele based on the quality of his advice and his level of service.

t 03 9680 1000  
[collinscowealth.com.au](http://collinscowealth.com.au)



## Ryk Eksteen



### Audit Principal, Collins & Co

Ryk heads up the Audit division of Collins & Co. Collins & Co is the largest accounting firm in the Western Suburbs. With 60 years' experience advising businesses across various industries, the firm has extensive expertise in working with not-for-profit organisations. The firm's approach is to place an emphasis on systems, risk exposure, accounting policies, governance issues and understanding the client's objectives.

t 03 9680 1000  
[collinsco.com.au](http://collinsco.com.au)

Ryk specialises in the areas of audit and business services and has extensive experience advising and auditing not-for-profit organisations including dealing with compliance and corporate governance. His involvement in these organisations enables management to focus their time where it should be spent on achieving the organisation's objective of making a valuable contribution to the wider community.

Ryk is a Registered Company Auditor, a registered SMSF auditor, has a Bachelor of Accounting and an Honours Degree in Accounting and is a member of the Institute of Chartered Accountants Australia.







t 03 8630 2857  
[ethikate.com.au](http://ethikate.com.au)

### Principal Lawyer & Trade Marks Attorney, Ethikate

Kate is the founder and owner of Ethikate, a boutique Melbourne law firm specialising in brand and intellectual property protection. Ethikate is a specialist brand protection & intellectual property law firm, founded on integrity and with a rebellious and fearless spirit to push the boundaries of conventional legal practice. In an industry that is highly conservative and set on tradition, Ethikate dares to be different.

Kate has a strong commercial background acting in both commercial and legal roles for over 10 years. Kate has worked with high profile major sporting events, top tier and boutique law firms, small to medium businesses, government agencies, large multinational corporates and non-profit organisations, across a broad range of commercial and intellectual property law services. Just some of the non-profit organisations that Kate has worked with include the Royal Children's Hospital Foundation, Muscular Dystrophy Foundation, Childhood Cancer Support Inc., Royal Flying Doctors, White Wreath, Queensland Former Origin Greats (FOGS), Brain Injury Association of Queensland, Grow, Keep Australia Beautiful National Association and Lung Foundation Australia.

Kate prides herself on being professional yet personable, and is passionate about providing specialist, tailored and innovative legal solutions for her clients.

Kate is a registered Principal Solicitor of the Supreme Court of Victoria and High Court of Australia, and a registered Trade Marks Attorney. She has a Bachelor of Laws (Honours, first class), a Bachelor of Science and a Bachelor of Arts as well as postgraduate studies in trade marks law. Kate has been the recipient of various academic awards during her years of study. She is a member of the Law Institute of Victoria, the Australian Institute of Patent and Trade Marks Attorneys (IPTA) and the International Trade Marks Association (INTA).

**ethikate**  
BRAND & IP PROTECTION

## Maria Stavrakis



t 03 9827 9962  
[madeyoulook.net.au](http://madeyoulook.net.au)

### Founder & Creative Director, Made You Look

Maria Stavrakis, Founder & Creative Director of Made You Look has over 17 years experience in the graphic design industry. Maria has worked for clients as diverse as the City of Melbourne, Red Cross, Nando's, Mirabella International, ANZ, Domestic & General Insurance, National Asthma Foundation, Fire protection Association and the Department of Sustainability.

Maria's branding insights, her creativity and unique approach to the design process – and the particular focus she directs towards her clients – sets her apart from her contemporaries. Maria leads a passionate and cohesive collective that includes strategic planners, graphic designers, copywriters and photographers.

Maria's work with not-for-profits over the years has helped them not only define their brand but also develop strategic marketing material that works.



## Robyn England



t 0424 258 760  
[ignitis.com.au](http://ignitis.com.au)

### Consultant, Ignitis

Robyn is a consultant with Ignitis, a niche consulting firm specialising in using the discipline of project management to achieve business excellence in the SME and not-for-profit sectors, through process improvement, project design and delivery.

Early in her career Robyn worked in direct client service delivery for local government in the UK, and then moved to a large not-for-profit in the Education Sector, delivering contracts on behalf of the UK government, where she first discovered she was a project manager.

Robyn specialises in utilising the perspectives of change management and knowledge management disciplines within projects; leveraging learnings that already exist within organisations; ensuring that the impacts projects have on people are handled mindfully.

Robyn is a member of the Project Management Institute and is a mentor in their professional mentoring program.



# Event booking form

Registration for this event closes on **Wednesday 20 May 2015.**

Please complete and mail back to:

**Rosie Newman**  
Collins & Co  
127 Paisley St, Footscray VIC 3011

Or scan and email back to  
**partner@collinsco.com.au**

Full Name .....

Company .....

Email .....

## Cost

☐ Early bird (register by 8 May 2015) – **\$80**

☐ Registration after 8 May 2015 – **\$100**

## Payment options

### Pay via Direct Debit

Bank **NAB**  
Account Name **Collins & Co**  
BSB No **083 144**  
Account No **946475410**

### Pay via Cheque

Cheques made payable to:  
**Collins & Co**  
**ABN: 15893818045**  
  
*Send cheques to Collins & Co*  
*127 Paisley Street Footscray VIC 3011*

*Include conference and full name in description*

## Credit Card Payments

Card Holders Name .....

Card No. ....

Expiry Date                      / .....

CVV No. ....

*I hereby authorise the above credit card to be charged.*

Name .....

Signature .....



