



NATIONAL
ASSOCIATION OF
ATTORNEYS GENERAL



NASCO

2023 NAAG/NASCO Virtual Charities Conference

DRAFT PUBLIC DAY AGENDA

WEDNESDAY, OCTOBER 11

ALL TIMES ARE IN EASTERN TIME

<p>12:00 PM – 12:10 PM</p>	<p>Opening and Introductions</p> <p>Leslie Friedlander, President, National Association of Charities Officials (NASCO), Assistant Attorney General, Texas Attorney General’s Office Todd Leatherman, Director, Center for Consumer Protection, National Association of Attorneys General John Formella, NAAG Charities Committee Co-Chair and Attorney General of New Hampshire Letitia James, NAAG Charities Committee Co-Chair and Attorney General of New York</p>
<p>12:10 PM – 1:00 PM</p>	<p>State of the Nonprofit Sector</p> <p>Description Experienced sector presenters will provide a comprehensive overview of the charitable community today. This presentation will include an examination of the scale and scope of the charitable sector, offer data demonstrating external threats to the sustainability of the sector, and propose ideas for how state charity regulators and the sector can work together to protect and serve the public good.</p> <p>Moderator Brian Yacker, JD/CPA, Baker Tilly</p> <p>Panelists Donna Murray-Brown, Vice President of Strategy and Development, National Council of Nonprofits Tim Delaney, President & CEO, National Council of Nonprofits</p>

1:00 PM – 1:50 PM	<p>Lessons in Nonprofit Governance from the Big (and Small) Screen</p> <p>Description What can we learn about good and not-so-good governance from popular shows and movies? With examples from Ted Lasso, Succession, and Star Wars, this session delves into governance topics including board composition, delegation and oversight, shared leadership models, the consideration of organizational values in meeting fiduciary duties, and conflicts of interest.</p> <p>Moderator Beth Short, Outreach and Education, Ohio Attorney General’s Office</p> <p>Panelist Gene Takagi, Principal, NEO Law Group</p>
1:50 PM – 2:00 PM	<p>State Update – Part I</p> <p>Description State regulators share brief updates on recent enforcement actions, outreach activities, and regulatory and legislative changes based on information in NASCO’s Annual Report.</p> <p>Moderator Josh Studor, Assistant Attorney General, Washington Attorney General’s Office</p> <p>Panelist TBD</p>
2:00 PM – 2:15 PM	<p>BREAK</p>
2:15 PM – 3:05 PM	<p>Purpose Driven Board Leadership</p> <p>Description A new way of framing the nonprofit board member’s role, purpose-driven board leadership prioritizes the organization’s purpose and mission over the organization itself, acknowledging the unique charge of social sector organizations and their leadership. The “purpose-driven board” challenges its members to reimagine their most essential roles, focusing on equitable social outcomes, broad-based impacts, community representation, and inclusive listening. In this session, learn about the principles of purpose-driven board leadership and how those principles can help organizations accomplish their missions.</p> <p>Moderator Heather Weigler, Senior Assistant Attorney General, Oregon Attorney General’s Office</p> <p>Panelist Dani Robbins, Director of Governance Strategy, Board Source</p>



For more information about the National Association of State Charity Officials, please visit [nasconet.org](https://www.nasconet.org)

3:05 PM – 3:55 PM	<p>The Uses of Different Business Structures by Charities</p> <p>Description Entity formation options for charities have grown increasingly complex. Today, charity leadership has a range of issues to consider when creating a new entity or program. This presentation will focus on some of the latest developments in what can be complex arrangements and structures within the sector.</p> <p>Moderator Karen Kunstler Goldman, Assistant Attorney General, New York Attorney General’s Office</p> <p>Panelist Sharon Lincoln, Partner, Casner & Edwards, LLP</p>
3:55 PM – 4:05 PM	<p>State Update – Part II</p> <p>Description State regulators share brief updates on recent enforcement actions, outreach activities, and regulatory and legislative changes based on information in NASCO’s Annual Report.</p> <p>Moderator Josh Studor, Assistant Attorney General, Washington Attorney General’s Office</p> <p>Panelist TBD</p>
4:05 PM – 4:20 PM	<p>BREAK</p>
4:20 PM – 5:20 PM	<p>Ethical Representation When Interests Diverge</p> <p>Description Sometimes the interests of the corporation and the interests of its principals don’t align. How should a lawyer representing the corporation address a conflict of interests between the corporate client and the directors who control the purse strings? What perils and pitfalls arise when a lawyer represents both the nonprofit and one or more of its principals? How should a lawyer representing the corporation address irreconcilable board disagreements? This ethics presentation will discuss the application of Rules of Professional Conduct 1.6–1.9 and 1.13 and apply them to real-world scenarios.</p> <p>Moderator Diane Quinlan, Director of Charitable Trusts, New Hampshire Department of Justice</p> <p>Panelists Kayci Petenko, Founding Partner, Fleming Petenko Law Michael Peregrine, McDermott, Will & Emery</p>

	Josh Studor , Assistant Attorney General, Washington Attorney General's Office
5:20 PM – 5:30 PM	Closing Remarks Leslie Friedlander , Assistant Attorney General, Texas Attorney General's Office Todd Leatherman , Director, Consumer Protection Division, National Association of Attorneys General