Oregon State Bar

Stocking the Toolbox: Nonprofit Nuts, Bolts, and Best Practices

Cosponsored by the Nonprofit Organizations Law Section

Register at www.osbar.org/seminars *(search for NOLS26)*

Friday, December 4, 2026

8:25 a.m.–3:30 p.m. PST

Oregon State Bar Center

16037 SW Upper Boones Ferry Rd., Tigard
or Via Live Webcast

CLE credits: 5 General

MCLE ID #: 137743

Register now at www.osbar.org/seminars
(search for NOLS26)

This program offers a practical and timely exploration of the legal, regulatory, and operational issues facing nonprofit organizations. Delve into the changing legal landscape for nonprofits in 2026. Learn about tools for building successful planned gifts and mitigating risk while handling employee terminations. Review nonprofit lawyering basics and 501c3 alternatives.

Nonprofit Organizations Law Section members save $20 off registration rates.

Special thanks to the Nonprofit Organizations Law Section for sponsoring lunch for all in-person attendees.

In-Person Event

$125	ONLD member
$180	Nonprofit Organizations Law Section member
$200	OSB licensee
$210	Non-OSB licensee
$0	Box lunch

Lunch and electronic materials are included with your registration.

Live Webcast

$125	ONLD member
$180	Nonprofit Organizations Law Section member
$200	OSB licensee
$210	Non-OSB licensee

Webcast registration includes online access to the recorded seminar for 60 days after the event. Electronic materials are included with your registration.

CC *Closed captions available*

50-Year and Active Pro Bono OSB members and Oregon judges and their lawyer staff – please call the OSB CLE Service Center at (503) 431-6413 or (800) 452-8260, ext. 413 to register for the seminars.

Questions or need help with registration?

Call or email the OSB CLE Service Center: (503) 431-6413 or (800) 452-8260, ext. 413, or cle@osbar.org

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8:00 Registration and Continental Breakfast

8:25 Welcome

8:30 The Changing Legal Landscape for Nonprofits in 2026

- More scrutiny—tax exemption, Form 990s, fiscal sponsorship, DEI, charitable operations
- More conditions—federal grants, government funding and contractual requirements
- More compliance complexity—employment, state requirements, reporting, documentation and overlapping federal/state rules
- More uncertainty—executive orders, proposed regulations, litigation, changing agency interpretations and legislation that is still developing

Shouka Rezvani, *Rezvani Law & Consulting LLC, Portland, OR*

Heather Weigler, *Oregon Department of Justice, Portland, OR*

9:30 Networking Break

9:45 Blueprint to Bequest: Tools for Building Successful Planned Gifts

- Overview of planned giving vehicles and key considerations
- Perspectives of professionals involved including fundraisers, attorneys, and financial advisers
- Illustrative examples and gift planning scenarios

Steven Bell, *Ferguson Wellman Capital Management, Portland, OR*

Grady Goodall, *OSU Foundation, Corvallis, OR*

Victoria Bejarano Muirhead, *Stoel Rives, LLP, Portland, OR*

10:45 Networking Break

11:00 Nonprofit Lawyering: Back to Basics

- Assess whether a nonprofit structure is the best option for a client's goals
- Identify appropriate nonprofit entities and tax-exempt classifications
- Navigate key state and IRS formation requirements
- Recognize ongoing compliance and reporting obligations for nonprofits

Cordelia Daniels, *Resources Legacy Fund, San Francisco, CA*

Sarah Peters, *Clear Compass Legal, Eugene, OR*

12:00 Lunch (included with registration)

1:15 Beyond C3s

- Overview of 501(c)(4), (c)(5), (c)(6), (c)(7), and Section 527 organizations and how they differ in lobbying, political activity, donor deductibility, and disclosure requirements
- Summary of Oregon purpose-oriented entities, including nonprofit corporations, benefit companies, cooperatives, and stewardship trusts, and how they compare
- Examples illustrating approaches in realistic client scenarios, with audience discussion and participation

Kate Kilberg, *Kilberg Law LLC, Portland, OR*

Melissa Scholz, *Scholz Nonprofit Law, Eugene, OR*

2:15 Networking Break

2:30 Mitigating Risk: Employee Terminations, AI Governance, and Data Privacy

- Implementing progressive discipline, building defensive documentation, and timing termination decisions
- Guiding leadership through difficult employee separations and severance strategies
- Establishing ethical AI usage policies and risk assessments for clients
- Safeguarding sensitive information and maintaining institutional compliance amid evolving regulations

Nicole Edmonds, *Scholz Nonprofit Law LLC, Eugene, OR*

Heather Van Meter, *Miller Nash LLP, Vancouver, WA*

3:30 Adjourn

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Planning Committee

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Stephanie Dolan, *Law Garden LLC, Eugene, OR*

Peter Evalds, *Foster Garvey PC, Portland, OR*

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Laura Hauber, *University of Oregon School of Law, Eugene, OR*

Andrew Morgan, *Mercy Corps, Portland, OR*

Sarah Peters, *Clear Compass Legal, Eugene, OR*

Shouka Rezvani, *Rezvani Law & Consulting LLC, Portland, OR*

Ian Richardson, *Gleaves Swearingen LLP, Eugene, OR*

Eric Robertson, *Hurwit and Associates, Newton Highlands, MA*

Catherine Schulist, *Watkinson Laird Rubenstein PC, Eugene, OR*

Meliah Schultzman, *CareOregon, Portland, OR*

Heather Weigler *Oregon Department of Justice, Portland, OR*

General Information

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Dietary Restrictions or Accessibility Accommodations: Please call (503) 431-6375 or (800) 452-8260, ext. 375, at least 72 hours before the date of the seminar.

Hotel Accommodations: Discounted rates are available at The Grand Hotel at Bridgeport, 7265 SW Hazel Fern Rd., Tigard, OR 97224. Call 503-968-5757 / toll free 1-866-968-5757 and reference the Oregon State Bar rate or click here reserve online.

Products

NOLS26.CD

Audio CDs with electronic materials..... $200

This seminar will be available on-demand after the live program. Please visit www.osbar.org/seminars and search for NOLS26. On-demand access is available for 60 days after the date of purchase.