

We have to believe that  
**EVERY** person counts,  
counts as a creative force  
that can move mountains.

~May Sarton (poet)



BAYER CENTER FOR  
NONPROFIT MANAGEMENT

[RMU.EDU/BCNM](http://RMU.EDU/BCNM)

FALL 2019 COURSES

# Letter From

# PEGGY MORRISON OUTON

Fall 2019 – what will it hold for your organization? The myriad of challenges that face our communities are daily and ever present. We believe that a task starting this fall is one of participation, representation, and equity. There is necessity for an accurate and complete census in 2020.

Our quote asserts the importance of counting **EVERY** person because we believe that every one of us can contribute to the health and well-being of all of us. The nonprofit sector is built on the premise that a just and humane society supporting the needs and aspirations of a diverse, multi-dimensional society is critical to our future. With such deliberate and intentional value placed on all of us, we build the world we're proud to leave to our children.

So to that end, we at the Bayer Center and the Covestro Center are proud to join the Keystone Counts statewide efforts and partner locally with GPNP to support the work that nonprofits can do with their constituencies to ensure the 2020 census is accurate and comprehensive.

It's great that on *All Souls Day, 1 November*, we will host a conversation with Yinka Aganga-Williams, AJAPO, Rabbi Ron Symons of the JCC of Greater Pittsburgh and Kelci Degnan, Allegheny County Library Association about why the census matters to nonprofits. We will follow that discussion with two sessions (11/4 and 12/10) entitled *Nonprofits Lead the Count: Preparing Your Organization for the 2020 Census* with representatives of Allegheny County, the City of Pittsburgh, beamdata, GPNP, and the US Census Bureau. These hand-on, how-to sessions will

be repeated in early 2020 as we gear up for an effective and fair count. Please mark your calendars and start thinking about how best to engage those you serve in this important activity. They trust you and that trust may be essential to their willingness to participate in the Census.

As we go through these divisive and challenging days, we want to support the true assets of nonprofits, you! Please plan to join us on October 18 for year two of *Strategies for Resilience: Curiosity, Positivity and Risk-taking*. Last year's session was very well-received. It felt like the group collectively let out its held breath and breathed deeply as they explored how to be kinder to themselves and others. We need tools and time to nurture our abilities to wonder, believe, and step out there. These are some of what makes the future full of possibility rather than menace. Focusing on these capacities will lead to courageous decisions, generative action, and ways that we each can push against the darkness of our times.

So let's see...we all need to be counted...we all need to approach our lives with curiosity, a sense of optimism and potential, and a willingness to take appropriate and necessary risks...anything else? Well, yes! This catalog will also help your organization raise more money, build effective boards, use technology intelligently, and encourage leadership and growth throughout your organization. We're here every week, hoping to be helpful as you realize your dreams and aspirations for a more just and humane world. It is my privilege to know you. I truly wish you every success this fall and over time.

You know how we love quotes here, so in closing, here's another good one!

**Your time is limited, so don't waste it living someone else's life. Don't be trapped by dogma - which is living with the results of other people's thinking. Don't let the noise of others' opinions drown out your own inner voice. And most important, have the courage to follow your heart and intuition.**

Steve Jobs

Excelsior, beloveds!



**Peggy Morrison Outon**

*Assistant Vice President for Community Engagement and Leadership Development, Robert Morris University*

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## BAYER CENTER FOR NONPROFIT MANAGEMENT

RMU.EDU/BCNM

### Not like anybody else.

We're part of a university. We live the nonprofit life. We give you the time you need. These are the things that set us apart and are why thousands of organizations have come to trust the Bayer Center for Nonprofit Management at Robert Morris University as a comprehensive resource for education, consulting, coaching, research, and hands-on solutions for every aspect of nonprofit management.

### Every one of our solutions is a custom solution.

At the Bayer Center, we build a stronger community by helping to build stronger, more knowledgeable nonprofits. We do this through collaboration, patience and relationships, combined with decades upon decades of diverse success experience.

Our approach to education is to stay on top of what's happening in the sector, plan for what's going to happen, listen to you, and offer the ever-adapting menu of classes you see described in this catalog.

Our approach to consulting and coaching is, when time permits and circumstances warrant, to enter into a process that builds mutual trust and respect and long-lasting results. And when time doesn't permit, to help you deal with crisis in the instant and on the ground.

Our approach to thought leadership is to leverage our role as a Robert Morris University Center of Excellence, and to listen to you – through conversations, surveys, research and community gatherings – to bring together the best thinking on how our sector can most effectively enhance our community.

### Your reality is our reality.

Organizations on the front line need realistic solutions. Sometimes that means taking a class. Sometimes it means an in-depth planning process. And sometimes it may mean figuring out how to keep the doors open next month.

In 19 years of service to the nonprofit community, the Bayer Center has completed over 2,100 consulting engagements and educated over 11,000 students. Our consulting clients include human services, arts, faith-based, community development, environmental and educational organizations with budgets ranging from \$100,000 or less to more than \$50,000,000. Our intensive and customized management, governance, financial and technology consulting services are designed to educate leaders and have resulted in:

- Higher-functioning governing boards
- Enhanced financial planning and management
- Increased partnerships and strategic alliances
- More effective approaches to fundraising
- Better informed, evidence-based decisions for future directions
- More capable nonprofit leaders and organizations
- Effective management information systems
- Heightened brand awareness
- A strategic approach to decision-making

In short, at the Bayer Center, we work with you: *To provide effective and practical management and governance tools, information, education and research that strengthen nonprofit missions and multiply all investments of time, talent and money in regional nonprofit organizations.*



# COVESTRO CENTER FOR COMMUNITY ENGAGEMENT

RMU.EDU/COVESTRO

**CCCE connects corporate social purpose and nonprofits' missions for long-term impact.**

CCCE programs - BoardsWork!, SkillShare and the Executive Service Corps - provide nonprofits with a range of professional services they may otherwise be unable to afford.

Through our programs, we provide trained, service-minded corporate volunteers to nonprofits - whether it's new board directors, or teams of employees charged with solving a specific operational issue you need help with, or seasoned management consultants who can provide one-on-one advice and expertise.

We work to strengthen governance, operations improvements, and lasting connections with corporations and their employees.

Nonprofits can get connected by contacting Jennifer Pease at 412-397-6013 or [pease@rmu.edu](mailto:pease@rmu.edu).

## ESC PROFILE: Kathy Josephson

The Executive Service Corps (ESC) uses the skills of experienced, knowledgeable, and dedicated volunteer professionals to help nonprofits design targeted solutions to their challenges and opportunities, including BoardsWork! facilitation and SkillShare project management.

**"It is so incredibly rewarding to be able to help build some key skills that will help folks to succeed in their future endeavors."**

ESC volunteer Kathy Josephson (MHRM, PHR, SHRM-CP) shares her story of service and support to the nonprofit sector. Kathy has been a human resources professional for about 14 years. The majority of that experience has been in the nonprofit arena, with roles including all areas of HR, leadership, and operations. Kathy has experience as a nonprofit board member for many small nonprofits, including several animal rescues. She is currently assisting with the creation of a new nonprofit looking to open and maintain a local dog park. Kathy maintains active SHRM volunteer leadership and currently serves as President of the Human Resources Association of the Alleghenies. She currently is a personal caregiver and hospice volunteer.

### *What prompted you to inquire about the ESC program?*

A coworker and former ESC volunteer sent me information about the program, and I was very interested right away. I was looking to expand and diversify my community service experience beyond my home community. I wanted to see and learn other communities beyond my backyard.

### *How has your professional career shaped your service in the nonprofit sector?*

I have always been drawn to the nonprofit sector because of the mission of the work. I absolutely love learning about organizations that creatively use resources to support and benefit communities with collective values. I truly believe in building strong communities and supporting one another for the greater good.

### *Can you highlight some of the key moments or accomplishments during your work through ESC so far?*

Through ESC, I have gotten to meet so many unique individuals who are so smart and caring. It is so incredibly rewarding to be able to help build some key skills that will help folks to succeed in their future endeavors. I have done this through conducting training and workshops on specific HR topics. I have worked with a variety of organizations through ESC and have learned just as much from everyone that I have met as they have from me. I specifically remember the folks who come up to me after a training session who tell me that they learned so much and thank me.

### *Your expertise lies in HR. What do you feel are a few of the best ways to strengthen this area in nonprofit organizations moving forward?*

Nonprofit organizations are usually so focused on the mission, that there is not a lot of time to devote to HR until an issue becomes too big and costly to ignore. I feel that armed with a little bit of HR knowledge, nonprofit organizations can put some best practices into place to proactively protect themselves from common pitfalls that can really harm an organization.



### *What would you tell other individuals who are interested in volunteering in a similar capacity?*

I would definitely focus on how rewarding the projects are. I thoroughly enjoy hearing the feedback from organizations that I work with as much as I enjoy learning about their organizations.

### *Outside of working as an HR professional and serving on boards, what (or who) gives your live purpose and passion?*

I am so inspired by the work folks are doing out there to help others whether it is folks with disabilities (my day job) or our four-legged friends who just need a safe space. I feel that my strength in the HR field can help support those folks by reducing admin cost and time so that they can spend their resources doing the REAL work that benefits the community.

## **BoardsWork! is a very helpful program.**

Historic Harmony, a nonprofit committed to preserving and promoting public knowledge of the Harmony area's history and heritage through its museum and outreach activities, came to BoardsWork! with a plan. As a board they wanted to strengthen the organization's financial security, build and sustain high-performing committees, and grow and diversify its fundraising capacity - all while keeping board members engaged, on task, and united in their mission.

Don Block, ESC volunteer, helped to facilitate this process. Don is a specialist in nonprofit management, including board development, operations, and fundraising, and has taught a number of classes at the Bayer Center for Nonprofit Management.

While Historic Harmony's board leadership completed governance assessments to help pinpoint specific opportunities and challenges, all board members had an opportunity to tailor a four-hour retreat, based on their responses to a skills and satisfaction survey. Don then brought it all together to create the organization's agenda and working session.

Board members noted after the retreat on ways BoardsWork! will help them be stronger and more sustainable, including:

- Being more effective with the tools we already have
- Prioritizing our goals
- Planning for our long-term success

Historic Harmony administrator Kathy Luek appreciated the time used to create an action plan and acknowledged the intricacies of board management.

**"Thank you for taking the time to discuss the issues facing our board and preparing [us] to take action."**



## COVESTRO CENTER FOR COMMUNITY ENGAGEMENT

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**Ready to transform your organization?**

We can help! To get engaged with BoardsWork!, SkillShare, or the Executive Service Corps, visit our website at [www.rmu.edu/covestro](http://www.rmu.edu/covestro) or contact CCCE program specialist Jennifer Pease at 412-397-6013 or [pease@rmu.edu](mailto:pease@rmu.edu).

### Covestro and The Bradley Center: A Collaboration in Skill and Spirit

Every year, Covestro participates in SkillShare, working in teams of 3 to 5 employees with nonprofit organizations to solve a well-defined technical or management challenge in approximately 12 to 14 weeks. Patrick Furey, senior global analytics specialist, knew he needed to get involved. His expertise in human resources, core competency development, statistical analysis, and I/O psychology – paired with his passion for helping vulnerable and under-served populations – made him a perfect fit for the Bradley Center’s need to build HR infrastructure within the organization.

The Bradley Center (TBC) is a steadfast nonprofit that is committed to improving the lives of children, youth, and families affected by trauma, mental illness, and behavioral health challenges. TBC was in the process of updating its organizational chart, job titles, job descriptions, and bonus evaluation process, looking to “ignite the passion” in their staff and have a reward process that recognizes staff who go above and beyond expectations on a regular basis.

Patrick wrote about their collaboration and his experience in this program.



**“Our neighbors need our help and you have the skills they need. All you need to do is accept the mission. How will you make Pittsburgh a brighter place in 2019?”**

“I wanted to make the world a brighter place, right here in Pittsburgh. I already do exciting work for a great company, but I also wanted to use my professional skills to help contribute to the success of the mission of a nonprofit organization. We live in a world and in a city of many needs. There are people in every community who have needs that would be unmet without the daily efforts of selfless and service-oriented people, many of whom work for nonprofit organizations. There are literally thousands of these nonprofit organizations serving the needs and interests of the people of Pittsburgh alone, and they need our help. Resources are often scarce for these nonprofits, especially for professional consultation. SkillShare offers the bridge I was looking for between nonprofits and Covestro professionals to build solutions to major challenges these nonprofits are facing.

I first heard about the program through an internal referral. My colleague told me about his great experience participating in SkillShare last year, and I immediately reached out to join

The Bradley Center partnered with the Covestro Center for Community Engagement’s SkillShare initiative to help them build important HR infrastructure. I have a background in Industrial & Organizational Psychology and have been an internal or external consultant of strategic HR professional services my entire career. For me, this project was a perfect fit to my skills! The project gave me the opportunity to further master and develop these skills.

There were also people on my project team who came from very diverse backgrounds and functional areas in Covestro. Some of the most helpful and creative ideas for our project, and other 2018 projects, came from Covestro team members who had subject matter expertise in different disciplines. SkillShare initiates each program cycle with a survey to assess relevant skills, then matches you with a nonprofit project and team of Covestro colleagues accordingly. You just need to remain open to creative ways to use your skills, and be courageous enough to offer your ideas to your project team. Regardless of the project to which you are assigned, you will have a tremendous opportunity to develop yourself and your Covestro and community networks.”

#### **For anyone thinking about participating in the future, consider the following:**

“We have all learned incredibly valuable and useful skills in the course of our careers. We are surrounded by the needs of our fellow Pittsburgh’ers, our neighbors, every day. Our neighbors need our help, and you have the skills they need. The SkillShare program has already discovered their needs. All you need to do is accept the mission. How will you make Pittsburgh a brighter place in 2019?”

#### **And what did TBC think of the collaboration?**

Executive Director Lisa Fox said, “The project will improve the effectiveness of our HR evaluation process. The Covestro team was able to make significant progress towards a great tool for us. Our hope is that improved core competencies/evaluations will assist us with staff retention. We were blessed to have been a part of the SkillShare program. The team challenged, inspired, and delivered to our agency with impressive results!”



# Nonprofits are Key to a FAIR and ACCURATE 2020 Census!

## EVERY person counts!

**Location:** Nonprofits are densely located in hard-to-count areas.

**Access:** Nonprofits have everyday contact with communities most at risk of being undercounted. Without inventing a new program, nonprofits can provide basic information to the thousands who pass through their doors on how and why to participate in the Census.

**Trust:** Nonprofits have trusting relationships with the communities they serve and can act as powerful vehicles for education about the importance of Census participation. When the message to be counted comes from a trusted entity, people are more likely to participate.

**Multilingual:** Nonprofits connect to a range of constituencies and cultures. Most nonprofits serving communities who speak languages other than English, can provide access to Census education materials in their communities' languages.

**Visibility:** Nonprofits are out in the community at events, meetings and everywhere people live, work and play.

**A Vested Interest:** Nonprofits driven by social missions have an inherent interest in ensuring that their communities have access to the funds, services, representation and physical and social infrastructure impacted by the Census count.

This fall, The Bayer Center for Nonprofit Management and the Greater Pittsburgh Nonprofit Partnership have partnered to bring you FREE educational opportunities to learn why this matters, and what you can do to be prepared for the 2020 Census.

FROM NONPROFIT VOTE:  
[www.nonprofitvote.org](http://www.nonprofitvote.org)

\$675 billion dollars are distributed every year by the federal government based on Census data. Of that, \$26 billion dollars came to Pennsylvania. We wanted to explore how those resources make their way to Allegheny County. Here are a few examples of how our community benefits from Census-derived funding.

- Title 1 grants are used to help at-risk students achieve success. The grants are allocated to schools based on population and income data collected by the Census Bureau.
- The 2010 Census missed 1 million young children, costing over a billion dollars a year in federal funding for programs like Head Start. Head Start programs use Census-derived poverty data to help determine program eligibility. Allegheny County Department of Human Services received over \$10M in funding for Head Start programs. Those funds provide early learning programs to low-income children from birth to age 5.
- Allegheny County received over \$18 million in 2018 in Community Development Block Grants to support parks, local businesses, ensure affordable housing and more.
- SNAP is the second largest federal program in Pennsylvania relying on Census data. Nearly 1 in 7 people in Allegheny County (~170,000 people) are facing food insecurity. SNAP, WIC and School Meals Program all rely on Census data to provide needed services.

## Why the Census Matters to Nonprofits

Friday, Nov. 1 from 9 – 11 a.m.

Most people understand that the Census helps determine political representation in our communities, but it counts for so much more. Census data is used to determine allocation of critical funding that nonprofits and those you serve rely on including health care, education, social services and more, but communities of color, low-income households, immigrants, and young children are historically undercounted at disproportionately high rates. This issue is core to the effectiveness of nonprofit work! Join us for a crucial and motivating discussion on how we as the nonprofit workforce can ensure that everyone is counted.

**PANELISTS:** Peggy Outon (moderator), Bayer Center and Covestro Center; Yinka Aganga-Williams, AJAPO; Rabbi Ron Symons, JCC of Greater Pittsburgh; Kelci Degnian, Allegheny County Library Association

**FEE:** FREE but RSVP is required

## Nonprofits Lead the Count: Preparing Your Organization for the 2020 Census

Monday, Nov. 4 from 1 – 4 p.m. OR Tuesday, Dec. 10 from 1 – 4 p.m.

Every 10 years, the United States conducts a Census of the entire population – a critical endeavor that determines congressional representation and allocates over \$675 billion in federal funding to support schools, hospitals, infrastructure and community-based services. Nonprofit organizations rely on accurate Census data to inform decision-making for grants, programming, and overall community impact. As such, they are critical stakeholders that need to be engaged in mobilizing individuals to complete the 2020 Census questionnaire.

During this interactive and hands-on workshop, you will hear from officials at the U.S. Census Bureau, representatives from local government, and community partners about efforts underway in Pittsburgh and throughout Allegheny County to increase participation in the 2020 Census. They will equip nonprofit organizations of all sizes with the right tools to become Census Hubs, including how to:

- Use data to inform Census outreach strategies in your community
- Educate your organization's staff, clients and patrons about why the Census matters and how to combat misinformation
- Identify resources available to engage and mobilize individuals to complete the 2020 Census

**INSTRUCTORS:** Andréa Stanford and Jessica Mooney, Allegheny County; Bhavini Patel, beamdata; Feyi Alabi, City of Pittsburgh; Hannah Locop, GPNP; Sheila Beasley and Stephen Shope, U.S. Census Bureau

**FEE:** Free, but RSVP is required





# FUN AND EXCITING AT THE BAYER CENTER

## Strategies for Resilience: Curiosity, Positivity and Risk-Taking

Friday, Oct. 18 from 10 a.m. – 2:30 p.m.

In order to become more resilient, we need to allow ourselves to think differently! Join us for a day in which old ideas of progress and success are challenged by new ideas of curiosity, positivity and taking risks. One-hour topics will be intertwined with food and networking, and will include:

### *Curiosity & Wonder: Frivolous or Necessary?*

Seeing the world as a good place or a bad place has everything to do with the energy, resources, and strategies we bring to our work. Come discuss and discover the power of our perspectives on reality.

### *How to Bring Positivity to Your Workplace Without Being Annoying*

New research on the human brain makes it clear that stress, negativity, and fatigue take a toll on individuals and limit job performance. This hands-on session will help you understand how to bring your whole person to the workplace and help shake negative habits through activities that will deepen self-awareness and build more positive mindsets.

### *Freedom to Fail: The Outrageous Rewards of Risk-Taking*

Resilience in our lives and work calls for a power just as strong as fear and shame. We will explore what that power might be and how to use it effectively.

**INSTRUCTORS:** Dave Bindewald, Center for Play and Exploration and Wayne Jones, Wayne A. Jones Consulting

**FEE:** \$35 and includes lunch

**LOCATION:** RMU's Yorktown Hall, Westinghouse Room, 8256 University Blvd, Moon, PA 15108

## WE CONSULT!

Have a nonprofit need that classes can't cover? BCNM consultants can work with you to design a custom contract that can help improve team functioning, create or update policies and procedures, fundraise more effectively, develop a more engaged and higher functioning board, and so much more...allowing you to do the work that makes a difference.

During our 20 years of service to the community, we have completed over 2,000 consulting engagements. Our clients include environmental, arts, education, human service, community development, and advocacy organizations with budgets ranging from \$100,000 or less to more than \$50,000,000.

### Consulting Spotlight: Strategic Planning

Looking for a clearer focus on how you can meet the needs of the communities you serve? Tired of fighting fires and hungry for a longer-term view? It may be time to consider strategic planning.

At BCNM, we believe your nonprofit has the answers. In strategic planning contracts, our job is to listen carefully and assemble all that we hear in a way that brings your potential choices to light.

- We have a variety of internally and externally focused tools to help surface information that will expand your thinking of what's possible
- We know how to involve a variety of stakeholders in decision-making in efficient ways that build engagement
- We know the world evolves quickly, and can help create plans are responsive to inevitable change

### Client Story:

An established organization's solid foundation of success was challenged by the changing needs of their clients. Plus, their executive leader would be transitioning out in the next year. They needed a planning process that would connect them more deeply to their stakeholders, help them tell their new story for the future, and attract the right candidates for their soon-to-be open leadership position.

BCNM conducted a comprehensive assessment process, gathering information from inside and outside of the organization and sharing it in a digestible format. Board and staff leadership worked together at planning retreat, allowing them to identify appropriate areas of focus and emerge pointed in the same direction. Subsequently, working groups of staff and board developed goals and objectives, nailing down accountability and timelines.

The result? Years later, the organization gave us another call. They'd accomplished all of their goals, navigated a successful transition, and were ready to start the next strategic plan for a new set of opportunities and challenges!

We customize strategic planning contracts to match many different timelines and levels of complexity. Contact Susan Loucks at **412-397-6006** or **loucks@rmu.edu** to learn more.

*"In many ways the service has been excellent in helping us plan for the future endeavors that would enhance our performance."* – Trisha M. Gadson, CEO, Macedonia FACE

# FINANCE CLASSES

If numbers were your favorite thing, you probably wouldn't have gone into nonprofits. But finance doesn't have to be scary, and it doesn't have to be hard. The Bayer Center's focus in our financial consulting and classes is always on the practical. We're pretty good with the numbers, but we've lost count of how many clients have told us that we made accounting understandable for the first time. Whether we're with you in a three-hour class or working as your consultant, our goal is to help you use your finances as a tool for managing your organization and delivering your services more effectively. Clarity is our business.

Some of the ways we assist organizations are:

- Analyzing financial performance ratios to identify areas of concern and aid in management decisions
- Clarifying cost allocations to determine how individual programs contribute to the bottom line or require subsidization
- Educating boards on what to monitor in financial reports and how to interpret the data
- Considering financial issues in strategic decision-making

For information about BCNM Financial Consulting, call **412-397-6000**.

## **Budgeting and Cash Flow Projection: Essential Tools in Running a Nonprofit Organization**

*Friday, Sept. 27 from 9 – 11 a.m.*

Learn how to create a budget and to forecast your annual cash inflows and outflows. We'll walk you through the steps to take to create a budget for the first time or to strengthen your budgeting process, and demonstrate how the budget can be used to drive strategy in your organization. We will also assist you in creating a 12-month cash flow projection, work through in-class examples, and discuss why planning for cash flow is essential to running a healthy organization.

INSTRUCTOR: Joe Zovko and Lindsay Andrews, Louis Plung & Company

FEE: \$40

## **Understanding and Identifying Unrelated Business Taxable Income**

*Tuesday, Oct. 22 from 9 a.m. – noon*

Having trouble determining whether any of your organization's income is taxable unrelated business income? This class will explain the fundamental concepts of unrelated business income and common exceptions to the UBTI rules. Participants will also learn the three-prong test used to identify potential UBTI generating activities, and how to limit the organization's UBTI exposure. We'll take a look at case studies to both learn from and to test your knowledge to be sure that you have clarity on how these income sources should be treated

INSTRUCTORS: Debbie Ries, CPA and Evie Gardner, Bayer Center

FEE: \$65

## **A FUN Overview of Nonprofit Accounting for the Non-Accountant**

*Monday, Nov. 11 from 1 – 4 p.m.*

Join us for a summary of accounting essentials for nonprofit leaders and any nonprofit staff who wish to gain a deeper understanding of the finance function. We'll cover:

### **Financial Statement Preparation and Analysis**

Discussion of the required financial statements, records needed to prepare the financial statements (such as cost allocation plan, time records, classes), and analysis of results.

### **Unique Nonprofit Accounting Concepts**

Discussion regarding restricted contributions, tracking release of restrictions, multi-year pledges, conditional pledges, and other unique nonprofit accounting principles, as well as recommended nonprofit accounting policies and procedures.

### **New Accounting Standards**

Review of the new accounting standards, including the reporting requirements, and contributions made and received.

INSTRUCTORS: Edward G. Scherer, Joseph M. Delisi and Jean Watson, H2R CPA

FEE: \$65

## **QuickBooks for Nonprofits**

*Tuesday, Nov. 19 from 9 a.m. – 4 p.m.*

QuickBooks has a large share of the accounting software market and it is used frequently by nonprofit entities. In this class you will be instructed on how to design and setup a QuickBooks file for a nonprofit entity. We will then have each of you open a sample QuickBooks file and be provided with hands-on experience. This will include: how to enter and pay bills, track expenses, enter deposits and track all income. Upon finishing this, we will review the procedures for a successful month-end close and then apply it in the sample nonprofit QuickBooks file. This will be followed by learning the features of the QuickBooks reporting system and how to extract the information from it. This training will be specially tailored to nonprofits with hands-on computer training being taught by instructors who understand QuickBooks, nonprofit organizations and nonprofit accounting.

INSTRUCTOR: Melanie Rutan, Bookminders

FEE: \$125

LOCATION: Bookminders, 101 S 10th St, Pittsburgh, PA 15203

## **Finance Clinics**

Our ESC-led clinics offer individualized, expert advice on topics of interest for only \$65 an hour. 60-minute sessions are available by appointment.

### **Prepping for an Audit Clinic (2-hour minimum)**

Do the words financial audit make the hair on the back of your neck rise? Work with one of our volunteers to help make sure you're tracking your finances well, walk through the audit process, and gather required documentation long before the auditors arrive.

# NONPROFIT MANAGEMENT CLASSES

## What isn't nonprofit management?

At the Bayer Center, we view nonprofit management as a holistic quilt that weaves together diverse and mutually-supporting skills, from governance to fundraising to financial analysis to technology to marketing to forming partnerships and alliances... the list goes on and on. Put them all together and what you have is a strategic approach to decision-making that accounts for human needs and organizational sustainability. The following classes will help you learn the techniques; our coaching and consulting services will help you put them into practice.

Some of the ways we assist organizations are:

- Performing comprehensive organizational assessments
- Facilitating inclusive planning processes that adapt to an evolving definition of needs identified in the course of planning
- Recommending and exploring opportunities for partnerships and collaborations
- Creating fund development plans that reflect donor realities
- Researching and performing environmental scans that clarify the organization's position within its service and competitive landscape
- Offering professional coaching to nonprofit leaders

For information about Bayer Center Management Consulting, call **412-397-6000**.

### **BoardsWork! Board Member Training**

*Tuesday, Sept. 10 OR Wednesday, Nov. 6 from 8:30 a.m. – 4:30 p.m.*

Whether you're a seasoned board member or looking for your first board experience, you'll learn effective nonprofit governance that will prepare you to be matched with a local nonprofit or enhance your current board service. In this full-day session, we'll cover the full gamut of nonprofit governance including boardmanship, fundraising, financial oversight, planning and technology.

**INSTRUCTORS:** Peggy Outon, Evie Gardner and Carrie Richards, Bayer Center and Covestro Center

**FEE:** \$500 with matching services or \$400 without matching services

### **Executive Director Huddles**

*Thursdays, Sept. 12, Oct. 10, Nov. 14, Dec. 12 from noon – 1 p.m.*

Break down the isolation barrier! This exclusive affinity group for nonprofit EDs and CEOs is a unique monthly forum in which nonprofit chief executives come together for a brown bag lunch and to share experiences, challenges, solutions, and best practices. Join us as we launch this new group to deepen connections and build a community of support among participants.

**FACILITATOR:** Wendy Burtner, Steeltown Entertainment

**FEE:** Free, but RSVP is required. Please bring your lunch.

### **It's All About Respect: A Win-Win Approach to Preventing Workplace Harassment**

*Tuesday, Sept. 24 from 1 – 4 p.m.*

In the past 20 years since Anita Hill accused Clarence Thomas of workplace harassment, most organizations have created policies prohibiting harassing behavior, and employees have spent countless hours in harassment prevention training. Despite all of this effort, 35% of workers feel that they have been harassed at work as evidenced by recent revelations and the "MeToo" movement. In this session, we'll take a different approach to preventing harassment. We'll focus on the value of helping to create a positive workplace rather than warning workers about the negative consequences of behaviors. An examination of WIFM ("What's in it for me?") and a better understanding of unconscious bias can help managers, supervisors and anyone who aspires to a management role to do a better job leading employees in positive behaviors.

**INSTRUCTOR:** Phyllis Hartman, PGHR Consulting, Inc.

**FEE:** \$65

### **Does Your Case Statement Make the Grade?**

*Thursday, Sept. 26 from 9 a.m. – noon*

One of the essential tools for successful fundraising is the "case for support," also known as the case statement or statement of need. The case for support sets forth the rationale for your fundraising initiative, whether you are launching an annual campaign, a major gifts or capital campaign, or raising funds for some other purpose, such as endowment. Considering its importance, it's surprising how many nonprofit organizations have difficulty putting into words the reason or reasons for their fundraising project, and whose case statements are missing critical information. This class will discuss the various components of a case statement and the supporting information necessary to make a compelling case for support to your donor prospects.

**INSTRUCTOR:** Mark Lynch, Mark J. Lynch and Associates, LLC

**FEE:** \$65

### **The Impact of Leadership on Culture and Performance**

*Monday, Sept. 30 from 1 – 4 p.m.*

A distinguishing characteristic of a leading organizations is its culture and ability to develop leaders that create and sustain a healthy climate that drives engagement and success. In this session, we will provide a framework for understanding an organization's culture, the factors leading to and reinforcing that culture, and the most important "levers" for moving an organization in the desired direction to achieve better outcomes, including:

- Examining the key factors that drive and shape an organization's culture as well as the impact that culture has on individuals, teams, and the organization as a whole
- Examining a model for understanding "How Culture Works" and the direct and indirect impact that leaders have on culture
- A general road-map for initiating and managing cultural change

**INSTRUCTOR:** Tom Sullivan, ProGrowth Associates, LLC

**FEE:** \$65

### **Everyone Hates Your Meetings: How Liberating Structures Can Make Them Better**

*Tuesday, Oct. 1 from 9 a.m. – noon*

Too often organizations find that their meetings are ineffective. Rigid controlled discussion results in staff remaining silent and disengaging, while unfettered discussion can lead to chaos. Liberating Structures provides a toolkit for designing meetings that provide a productive balance of freedom and structure to engage participants and generate positive results. Participants will practice several of these structures that can be easily learned and implemented.

**INSTRUCTOR:** Wayne Jones, Wayne A. Jones Consulting

**FEE:** \$65



# NONPROFIT MANAGEMENT CLASSES

## HR Roundtables

The HR job can be a lonely one – thank goodness there’s strength in numbers. You need peers to challenge, listen, develop and encourage you. The HR Roundtable is just that. Every meeting the group discusses a topic with some insights brought from the trainer. Afterward, a good chunk of the meeting is dedicated to helping each other work through issues your organization is facing.

*Wednesday, Oct. 2 from 8:30 – 10 a.m.*

with Larry Silverman, Esquire

TOPIC: Wage and Hour Laws

*Wednesday, Nov. 20 from 8:30 – 10 a.m.*

with Geri Puleo, Change Management Solutions, Inc.

TOPIC: Avoiding a Burnout Culture

FEE: Free, but registration is required

LOCATION: ACHIEVA, 711 Bingham St, Pittsburgh, PA 15203

## Size Matters: Best Practices for Small Boards

*Wednesday, Oct. 2 from 9 a.m. – noon*

What are the benefits and challenges of a small board of directors? How do you determine what size fits your unique mission and goals? How can you make the best of what you have and when should you start to plan for something bigger? We’ll talk about “best practices” and oh so much more at this workshop prepared specifically for small nonprofit organizations and their boards.

INSTRUCTOR: Luci Dabney, Program to Aid Citizen Enterprise

FEE: \$65

## Aligning Mission, Strategies and Outcomes to Receive Funding

*Wednesday, Oct. 2 from 1 – 4 p.m.*

Foundations search for data-driven, results-oriented, and mission-aligned organizations. Nonprofits that supply accurate, aligned data have a 44% increase in securing funding. Through discussion, small group exercises, and the Nonprofit Alignment Blueprint (NPAB), participants will take a closer look at how their mission, programs, strategies and outcomes align. The NPAB is a proprietary tool developed by A-Z Advisors which supports nonprofit leaders as they examine, critique, and recognize comprehensive mission and strategies that produce results, as well as tools to measure and communicate their alignment to donors and funders.

INSTRUCTORS: Anthony Preston and Kevin McGuire, A-Z Advisors

FEE: \$65

## Developing Coaching Skills as a Manager

*Thursday, Oct. 3 from 9 a.m. – noon*

Coaching is one of the key ways to engage employees and help them to reach their full potential. This can mean helping a poor performer improve, helping your best performer be even better, or helping others acquire skills that will give them increased opportunities. Managers know that all the conflicting demands on their time can make it easy to put off the important task of developing employees. However, the most effective managers see developing employees as a key leadership responsibility. The best managers’ view coaching as a central measure of their own leadership performance. This workshop will give you key actions to use when coaching for optimal employee performance.

INSTRUCTOR: Joel Burnstein, Keep it Simple Training and Development, LLC

FEE: \$65

## Emotional Intelligence: A Critical Leadership Skill

*Tuesday, Oct. 8 from 9 a.m. – noon*

Emotional intelligence is often cited in newspapers, magazines, and books as a critical ingredient to leadership success. Yet, we often do not take full advantage of emotional intelligence in practice. In this interactive workshop, you will learn what emotional intelligence is and how to best exercise it at your nonprofit. As you develop and drive excitement across your team, this workshop will provide you with a foundation for emotional intelligence and useful tools to implement on the job. We will discuss the EQ-i 2.0 model (Emotional Quotient Inventory), along with the background and five dimensions of Self-Perception, Self-Expression, Interpersonal, Decision Making and Stress Management, including 15 sub-dimension competencies.

INSTRUCTOR: Peter Gabriel, Key Leadership, LLC

FEE: \$65

## Maximizing Donor Retention

*Thursday, Oct. 10 from 9 a.m. – noon*

Retaining existing donors costs less than acquiring new ones. Current donors already believe in your mission and have shown a willingness to help you accomplish it. Unfortunately, across the nonprofit sector, donor retention rates are low – typically less than 50%, with some organizations seeing rates as low as 25%. This puts us all in a perpetual scramble to find new donors. This is an extremely costly way of running a nonprofit fundraising program. What should you be doing to achieve better donor retention? How can you better encourage your donors to stick around? Join us for a workshop on developing a sustainable donor pool through segmentation, customization, and stewardship.

INSTRUCTOR: Emma Kieran, Pilot Peak Consulting

FEE: \$65

## Executive Director Boot Camp

*Friday, Oct. 11 from 9 a.m. – 4 p.m.*

ED Boot Camp is a day-long, entry-level workshop for new executive directors. Topics covered will include the basics of nonprofit management including: tools and tips for effective leadership, organizational stability, fundraising, financial management, regulatory compliance, external relations and governance. The day will be interactive and will draw on the experience of the participants to support and share creativity, learn new strategies and identify action steps for personal, as well as organizational growth. For experienced nonprofit professionals who are new to the executive director role.

INSTRUCTOR: Wendy Burtner, Steeltown Entertainment

FEE: \$125

## Staff Retention in the Nonprofit World: Strategies for Success

*Tuesday, Oct. 15 from 9 a.m. – noon*

With the strains of limited funding, restrictive hourly wage, and stiff competition, nonprofits are seeking ways to retain their most valuable asset: the quality employee. There are many buzz words that relate to this issue such as employee engagement, and employee satisfaction. This session will provide a breakdown of the complexities of this issue, and a practical discussion on ways that organizational leaders can infuse practices into their organization that will work.

INSTRUCTOR: Mary Ann Poutous, Transitional Services

FEE: \$65

# NONPROFIT MANAGEMENT CLASSES

## Dealing with Dead Weight on Your Board

Wednesday, Oct. 16 from noon – 1 p.m. (ZOOM online session)

Many boards struggle with uneven participation by board members...some members whose faces you can't even remember! We'll explore the real challenges of evaluating the board, and strategize ways of dealing with "dead weight." Join us to puzzle together about best ways to both encourage and insist on consistency in participation.

INSTRUCTORS: Peggy Outon and Yvonne VanHaitsma, Bayer Center and Covestro Center

FEE: \$25

### Custom Training and Clinics

Like the topic but can't make the training? Want to bring a set of skills to your entire team? Searching for something that's not quite a match for what's in the catalog? Custom training may be just what you're looking for. We work with you to design and facilitate interactive trainings for groups of 5 to 105 on topics ranging from change management and leadership to communication and customer service. Our extensive experience in conducting workshops can be tailored to your organization's specific needs. For more information, contact Susan Loucks at [loucks@rmu.edu](mailto:loucks@rmu.edu) or 412-397-6006.

## Strategies for Resilience: Curiosity, Positivity and Risk-Taking

Friday, Oct. 18 from 10 a.m. – 2:30 p.m.

In order to become more resilient, we need to allow ourselves to think differently! Join us for a day in which old ideas of progress and success are challenged by new ideas of curiosity, positivity and taking risks. One-hour topics will be intertwined with food and networking, and will include:

### **Curiosity & Wonder: Frivolous or Necessary?**

Seeing the world as a Good place or a Bad place has everything to do with the energy, resources, and strategies we bring to our work. Come discuss and discover the power of our perspectives on reality.

### **How to Bring Positivity to Your Workplace Without Being Annoying**

New research on the human brain makes it clear that stress, negativity, and fatigue take a toll on individuals and limit job performance. This hands-on session will help you understand how to bring your whole person to the workplace and help shake negative habits through activities that will deepen self-awareness and build more positive mindsets.

### **Freedom to Fail: The Outrageous Rewards of Risk-Taking**

Resilience in our lives and work calls for a power just as strong as fear and shame. We will explore what that power might be and how to use it effectively.

INSTRUCTORS: Dave Bindewald, Center for Play and Exploration and Wayne Jones, Wayne A. Jones Consulting

FEE: \$35 and includes lunch

LOCATION: RMU's Yorktown Hall, Westinghouse Room, 8256 University Blvd, Moon, PA 15108

## Federal Grants for the Rest of Us: Securing Federal Funding Beyond Research

Tuesday, Oct. 22 from 9 a.m. – noon

Is your organization big enough to apply for federal funding? The answer may surprise you! In this session, you will learn about the breadth of federal funding and the many different goals it supports, how to evaluate a federal opportunity's fit with your programming, key requirements for applying for federal grants, and the core concepts for writing and submitting a federal grant.

### **Fundable Programs: Building What Funders Want Directly Into Your Programming**

Tuesday, Oct. 22 from 1 – 4 p.m.

If you've ever answered a list of funder questions about a program or struggled to find program details for a grant application, you know that successful fundraising is often not just about what your programs do, but how they do it. In this session, you will learn why and how good program design is related to funding; what program design elements funders want; how to demonstrate that your programs' needs, activities, outcomes, evaluation, and budget all support each other; and what to do when things don't go as planned.

INSTRUCTOR: Matt Carter, Grants Plus

FEE: \$65 per class or \$115 for the whole day

## Rowing Together to Make a Difference

Wednesday, Oct. 23 from 9 a.m. – noon

Do you feel like your leadership, your staff and your board are all rowing in different directions? Maybe sometimes not even in the same boat? The first step in aligning your teams is creating and sharing your compelling vision. Your mission and your vision are more than statements. Together they define why you exist. They need to be clear and well-communicated. Once they are, you can focus your staff, your programs and your services in ways that will lead you to success in fulfilling your purpose. In this workshop, we'll cover the difference between a mission and a vision statement and give you tools to clarify each one. We'll focus on the way vision inspires, provides direction and gives you parameters for making decisions. Then we'll work on ways to communicate, share and live out your organizational purpose. Whether you lead an entire organization or a department, a clear and compelling purpose will get them all rowing together – so you can make the difference you want to make.

INSTRUCTOR: Trina Walker, TLW Strategy

FEE: \$65

### **The Leadership Pipeline: Developing Future Leaders**

Monday, Oct. 28 from 1 – 4 p.m.

Although most organizations are committed to promoting from within, many don't have a plan or process in place for "growing their leaders." Sometimes we have to settle with who we have or search for outside talent to bring in. Both have a cost. In this workshop, we'll discuss how we can better strategize for developing and promoting leaders from within. From first-line supervisors to program directors and department managers to executive leaders, we'll look at a framework for building bench strength along with specific tools for assessing and developing our current leaders.

INSTRUCTOR: Tom Sullivan ProGrowth Associates, LLC

FEE: \$65

# NONPROFIT MANAGEMENT CLASSES

## The Making of a Mega Donor

Tuesday, Oct. 29 from 9 a.m. – noon

There are three ways to raise more money:

- Acquire more donors
- Improve your donor retention, and;
- Turn your donors into major gift donors... and possibly mega donors!

This session will provide samples and strategies for how best to provide opportunities for your donors to become major investors in your organization and focus on how to determine who is ready to be a mega donor. Once your organization has a strong major gifts program, you must always be positioned to turn your major donors into mega donors. We will discuss the definition of a major and mega donor and strategic ways to provide opportunities for philanthropists to invest in your organization. We will also discuss best practices for tracking donor movement and stewardship.

INSTRUCTORS: Lizz Helmsen and Arthur Scully, Carter

FEE: \$65

## Data Dilemmas: You've Gathered the Info, Let's Make Sure You Use It!

Thursday, Oct. 31 from 9 a.m. – noon

Well-used and analyzed data can show you how to improve your programs, but it can be overwhelming to deal with data collection and management. We'll help you break it down! In this session, we'll cover:

- The importance of clarifying your program's plans
- How that leads to the development of evaluation questions
- Finding existing data and build data collection into program work
- Methods to store and manage data
- How to analyze and report findings for differing audiences
- How evaluation findings can drive program improvement
- Hosting a data party, really! And other ways to boost use

INSTRUCTOR: Rekha Shukla, Barbara Goldberg & Associates, LLC

FEE: \$65

## Nightmare Board Dynamics

Thursday, Oct. 31 from noon – 1:30 p.m. (ZOOM online session)

Do you feel that disagreement gets in the way of your board's critical work? It doesn't have to be that way! Join us to learn ways to create a board that makes thoughtful, engaged decisions even with many diverse opinions and personalities. We will also explore how to build and maintain positive relationships between boards and their directors and staff.

INSTRUCTOR: Susan Loucks, Bayer Center

FEE: \$25

## Why the Census Matters to Nonprofits

Friday, Nov. 1 from 9 – 11 a.m.

Most people understand that the Census helps determine political representation in our communities, but it counts for so much more. Census data is used to determine allocation of critical funding that nonprofits and those you serve rely on including health care, education, social services and more, but communities of color, low-income households, immigrants, and young children are historically undercounted at disproportionately high rates. This issue is core to the effectiveness of nonprofit work! Join us for a crucial and motivating discussion on how we as the nonprofit workforces can ensure that everyone is counted.

PANELISTS: Peggy Outon (moderator), Bayer Center and Covestro Center; Yinka Aganga-Williams, AJAPO; Rabbi Ron Symons, JCC of Greater Pittsburgh; Kelci Degnan, Allegheny County Library Association

FEE: FREE but RSVP is required

## Nonprofits Lead the Count: Preparing Your Organization for the 2020 Census

Monday, Nov. 4 from 1 – 4 p.m. OR Tuesday, Dec. 10 from 1 – 4 p.m.

Every 10 years, the United States conducts a Census of the entire population – a critical endeavor that determines congressional representation and allocates over \$675 billion in federal funding to support schools, hospitals, infrastructure and community-based services. Nonprofit organizations rely on accurate Census data to inform decision-making for grants, programming, and overall community impact. As such, they are critical stakeholders that need to be engaged in mobilizing individuals to complete the 2020 Census questionnaire.

During this interactive and hands-on workshop, you will hear from officials at the U.S. Census Bureau, representatives from local government, and community partners about efforts underway in Pittsburgh and throughout Allegheny County to increase participation in the 2020 Census. They will equip nonprofit organizations of all sizes with the right tools to become Census Hubs, including how to:

- Use data to inform Census outreach strategies in your community
- Educate your organization's staff, clients and patrons about why the Census matters and how to combat misinformation
- Identify resources available to engage and mobilize individuals to complete the 2020 Census

INSTRUCTORS: Andréa Stanford and Jessica Mooney, Allegheny County; Bhavini Patel, beamdata; Feyi Alabi, City of Pittsburgh; Hannah Locop, GPNP; Sheila Beasley and Stephen Shope, U.S. Census Bureau

FEE: Free, but RSVP is required

## Executive Coaching

More than just a sympathetic ear, the Bayer Center's coaching program can help you be more effective at managing others, managing yourself, managing change, and balancing the demands of your professional and private lives. Our coaches can help you achieve a more effective organization and a peaceful night's sleep! Especially beneficial to those new to supervision and management, coaches help you draw on your own natural wisdom to make better decisions from a place of clarity and confidence.

COST: \$500 for each 6-hour coaching engagement. Smaller packages may be negotiated upon request. For more information, please contact Carrie Richards at 412-397-6008 or richardsc@rmu.edu.



# NONPROFIT MANAGEMENT CLASSES

## The Nuts and Bolts of Employment Law

*Tuesday, Nov. 5 from 1 – 4 p.m.*

It's no easy thing to manage a workforce, let alone to do so in a way that complies with the alphabet soup of laws that govern workplaces in Pennsylvania (to name a few, ADA, ADEA, FLSA, FMLA, GINA, MMA, PHRA, PMWA, Title VII...). That task can be even more daunting for nonprofit managers, who have to balance the pursuit of the organization's mission along with the trials of the ordinary workplace. This class will help you comply with the many laws and regulations that govern the employment relationship from soup-to-nuts (hiring to separation) and beyond (employee claims and disputes). You'll learn mistakes employers most often make and how to spot potential issues before they become big problems or lawsuits in areas like: employee contracts, including non-competes; pay practices; compliance with anti-discrimination laws, including those relating to sexual harassment; administration of employee leaves of absence; and disciplinary issues.

INSTRUCTOR: Jeremy V. Farrell, Esq., Tucker Arensberg, P.C.

FEE: \$65

## Planning and Running a Successful Capital Campaign

*Thursday, Nov. 7 from 9 a.m. – noon*

A successful capital campaign requires thorough planning and expert implementation, and nonprofits must ensure that they have checked the necessary boxes to help optimize their campaign's success. This class will provide an understanding of the key building blocks of a successful campaign including:

- The value of a campaign feasibility study
- The role of the staff, executive director, and the board, as well as a campaign consultant
- The importance of the chart of needed gifts and how to build one
- The major components of the campaign plan

INSTRUCTOR: Mark Lynch, Mark J. Lynch and Associates, LLC

FEE: \$65

## Go Deeper: Engaging and Cultivating Volunteers and Volunteer Groups

*Thursday, Nov. 7 from 1 – 4 p.m.*

In this class we will explore ways to engage volunteers beyond their actual volunteer experience to cultivate advocates and supporters. We will touch on individual and group volunteers of varying backgrounds and abilities, while focusing on Corporate Volunteer Groups and ways to leverage their Corporate Social Responsibility Policies to create long-term relationships and deepen partnerships that support your organization's mission.

INSTRUCTORS: Stacy Bodow and Julie Pfaltzgraff, Global Links

FEE: \$65

## Building an Inclusive Bench

*Friday, Nov. 8 from 9 – 11 a.m.*

How do you define diversity? Our community has been discussing board and staff diversity for a long time and it has become increasingly urgent. More specifically, in the past several months, PACE, Nonprofit Talent, The Bayer Center, The Covestro Center have all discussed equity and representation in a much more serious way – yet the problem persists, and we'll KEEP talking about it. This panel will continue to offer a specific and detailed conversation about culture and practice in nonprofit organizations that achieve a higher degree of vibrant diversity and inclusion.

PANELISTS: Peggy Outon (moderator), Bayer Center and Covestro Center; Patti Bucek, Vibrant Pittsburgh; Anu Jain, Inclusant; Mike Quigley, Robert Morris University

FEE: \$25

## Keeping the Strategic Plan Alive

*Tuesday, Nov. 12 from 9 a.m. – noon*

Once a strategic plan is completed, it's important to make sure the new plan doesn't just gather dust on a shelf. Let's put that strategic plan to work! We'll look at how to structure committees to best work with the plan, and how to use dashboards to keep track of the progress. We'll also discuss the importance of calibrating the strategic plan as the environment changes and make adjustments as necessary.

INSTRUCTOR: Peggy Outon, Bayer Center and Covestro Center

FEE: \$65

## Coffee and Conversation: Retirement

*Wednesday, Nov. 13 from 9 – 10 a.m.*

Are your employees ready to retire? Join us to review the various types of retirement plan benefits you can offer your employees from individual IRAs to group plans and the pros/cons of each option. Additionally, we will provide a breakdown of the benefits other nonprofits are offering their employees. Finally, we will touch on the fiduciary and administrative responsibilities you have when offering a retirement plan.

INSTRUCTORS: Jack Ryan and William Ferguson, HB Retirement

FEE: \$10. Breakfast will be provided, courtesy of HB Retirement

## A Planned Giving "How-To" for Smaller Nonprofits

*Thursday, Nov. 14 from 9 a.m. – noon*

Do you think you're ready? Has your organization been in operation for more than 10 years? Has your board approved or endorsed a planned giving program and allocated a budget? Does it include professional training opportunities for staff and capacity to engage fundraising and legal counsel? Has your annual fund grown in the past 5 years in the number of donors, number of gifts, and average gift amount? Do you have a concentration of donors 55 years and older? 65 and older? Do you communicate regularly with donors, including face-to-face meetings? Have you been notified of at least one planned gift within the past 3 years? Do you have a staff member who can commit time regularly to planned giving efforts? If your organization can say 'yes' to a majority of these questions, this class is designed to get you started on building a simple planned giving program.

INSTRUCTOR: James Sismour, University of Pittsburgh

FEE: \$65

## It's Not "If," It's "When": How to Mitigate Your Organization's Risk

*Thursday, Nov. 14 from 1 – 4 p.m.*

Cyberthreats, active shooter, fire...is your organization prepared for the next threat that might derail your organization? Unfortunately, the reality of something happening is a question of not if, but when. This course is designed to provide you with some information and tools to better prepare you and your organization in the prevention and risk mitigation with respect to these threats and more. Discussion will include current trends, common types of attacks and threats, and methods to strengthen your organization's overall preparedness. Please bring your nonprofit's manual and/or procedures to class.

INSTRUCTORS: Chris Cooke, PULSE and Stephanie Bucklew, SLB Consulting

FEE: \$65

# NONPROFIT MANAGEMENT CLASSES

## When Justice is Expensive

Friday, Nov. 15 from 9 – 11 a.m.

Nonprofit organizations all share a vision to see greater justice in the world. However, many nonprofits struggle to pay their employees in a just way when faced with enormous budget constraints. Come talk with nonprofit leaders and advocates on what we can do about this Catch 22 to see that nonprofit employees receive the same kind of justice for which they spend their own lives advocating.

PANELISTS: Peggy Outon (moderator), Bayer Center and Covestro Center; Fred Massey, Familylinks, Samantha Ellwood, Providence Connections; Dewitt Walton, A. Philip Randolph Institute

FEE: \$25

## Leveraging Leadership Transitions

Tuesday, Nov. 19 from 9 a.m. – noon

Executive Leadership transitions are anxiety-provoking for both board and staff. With preparation, however, they can be the springboard to growth and renewal. This class will cover practical planning for before, during, and after a transition, and illustrate how these moments can be used to surface exciting questions of mission, ownership, and direction.

INSTRUCTOR: Susan Loucks, Bayer Center

FEE: \$65

## Telling Stories that Stick

Thursday, Nov. 21 from 9 a.m. – noon

Are you looking for ways to share your organization's mission, goals and success? How do you tell others about the good you are doing and the work yet to be done? How might you get them to understand and care about your organization the way you do? You might call this advocacy, relationship-building or communications. It all boils down to telling your story – and telling it in a way that resonates with the listener, engages their hearts and minds and inspires them to think, feel or do something in support of your organization. In this session, we'll cover how to find the stories that illustrate your mission, goals and success, the elements of a good story, and ways to share your stories. You'll leave with ideas and templates to get you started in telling your own stories that stick.

INSTRUCTOR: Trina Walker, TLW Strategy

FEE: \$65

## Weathering the Recession

Tuesday, Dec. 10 from 9 – 11 a.m.

Anticipation is a requirement of effective leadership. The Bayer Center for Nonprofit Management Advisory Board recommended that we at the BCNM take the possibility of a recession very seriously – and we want to pass on that sound advice. We'll discuss issues around ensuring a strong and diversified fundraising plan coupled with systems to support your efforts and the vital continuation of IT as a strategy to protect your organization in good times and in bad.

INSTRUCTOR: Peggy Outon, Bayer Center and Covestro Center

FEE: \$40

**NONPROFIT MANAGEMENT CLINICS** Our ESC-led clinics offer individualized, expert advice on topics of interest for only \$65 an hour. 60-minute sessions are available by appointment.

### Board Basics (2-hour minimum)

Are you launching or rebuilding your board? Do you have a number of questions about the basics of board operations (meetings, officers, terms and term limits, key policies and functions, committees, etc.)? Register for this deep dive into board basics, where we'll answer your most pressing governance questions using a basic board assessment tool, and put your board on a path to success.

### Bylaws Clinic

Bylaws are important in directing the board and the organization. Due to recent changes in the 990 legislation, many nonprofits' bylaws are not in compliance with best practices. During this clinic, we will review your bylaws, give you suggestions for improvements, and guide you on how to discuss these with your board.

### Employee Handbook Clinic (2-hour minimum)

Is your employee handbook up to date and are all the vital elements included? Does its wording comply with wage and hour laws? Is it truly the employee information source that you would like it to be? We can help! During the clinic, we will do a complete review of your handbook and point out the sections that are missing or require revisions.

### Governance Clinic

Nonprofit governance is complex and nuanced. Let us help you navigate topics like committee structures or advisory boards; board member recruitment or on-boarding; or the board's role in fundraising, planning, financial or HR oversight. Bring your most burning board-governance questions, ask someone with seasoned experience, and leave with some potential next steps. This clinic is ideal for board members and Executive Directors.

### HR Clinic

Do your HR policies need to be updated? Is expansion requiring more staff and more new job descriptions? Are you facing layoffs, or do you have a pregnant staffer and no maternity policy? We can help you with these and other issues, including creating better performance appraisals, improving employee relations and restructuring benefits and compensation.

### Marketing Clinic

In this clinic, we'll review your current marketing strategy and materials, and give you advice about where you should focus your energy to align with your mission, customers, and needs.

### Nonprofit Start-up Clinic (2-hour minimum)

Thinking of starting a nonprofit? We'll give you one-on-one guidance with the next steps – whether it is more research, looking into fiscal sponsorship, or reviewing an exemption application. We'll guide you through different options and the decision-making process.

### Pinpoint Planning Clinic

Know you need to improve in a specific area? It provides executives and boards with a quick analysis of critical operations and specific recommendations for improvement. You can choose from: finances and financial management, fundraising, human resources, legal issues, governance and technology. Each PinPoint Planning™ tool is a type of audit that will take organizations about an hour to complete and return. The Bayer Center will assign an ESC volunteer from the relevant field to review your materials and then meet with you one-on-one for a working session. During your face-to-face meeting, you'll receive concrete, actionable suggestions to enhance your current operations. *This program was developed by the Bayer Center for Nonprofit Management in partnership with the United Way of Allegheny County.*

# TECHNOLOGY CLASSES

## Creating Effective Social Media Content

*Wednesday, Sept. 25 from 1 – 4 p.m.*

If a tree falls on social media and no one is around to ‘like’ it, does it make a sound? Sometimes a post to social media gets engagement and sometimes it gets crickets. You don’t have to be a digital native to get your message across on social media. This interactive session will explore how to create effective social media content through a multi-step process that you can use at your own organization. Come prepared to explore how to tell your agency’s story more effectively through social media.

INSTRUCTOR: Dave Tinker, ACHIEVA

FEE: \$65

Today more than ever, nonprofits need to use technology wisely to stay competitive, prove effectiveness and communicate with constituents. The Bayer Center’s tech instructors have a broad and deep knowledge of the technology issues challenging nonprofits. In our classroom, we speak English, not Geek, so that you can learn step-by-step.

## STREAMLINE YOUR WORKFLOW USING FREE AND/OR LOW-COST WEB APPS

Learn how the latest technology applications for virtual meetings (Zoom), project management (Asana), time tracking (Harvest), and messaging (Slack), can help you build maximum efficiency into your workflow. Bring your own laptop (or you can borrow one of ours!) for hands-on learning. Take all 4 sessions for the discounted price of just \$75.

### Conduct Online Meetings and Webinars with Zoom

*Thursday, Oct. 3 from 2 – 4 p.m.*

Nonprofits can save time and money on travel across town or across the country by using web apps to host online meetings. This workshop will focus on Zoom, the leader in online meetings, yet many features can be found in other cloud-based meeting software. Zoom enables users to conduct multi-participant audio and video meetings and webinars, incorporating features such as screen share and live chat. Attendees will gain experience in using Zoom to conduct multi-participant, online meetings, and how to record and post this content on Vimeo to share with staff and clients. We’ll review the features available in the free and paid versions of Zoom.

FEE: Free, but RSVP is required.

### Cloud-Based Project Management with Asana

*Tuesday, October 17 from 2 – 4 p.m.*

Nonprofits are increasingly working across programs and departments to tackle their mission. New cloud-based project management systems can help individuals and teams, whether working on the premise or remotely, to coordinate their work and track progress, all the while keeping valuable details and files centrally located. Asana has emerged as one of the most popular project management applications for entrepreneurs, small and large businesses, managers, and many others due to its ease of use and affordability (including a free version for groups of 10 or less). We’ll learn best practices in project management through interactive, hands-on exercises in Asana.

### Grant and Project Time-Tracking and Budgeting Using Harvest

*Thursday, Nov. 21 from 2 – 4 p.m.*

Nonprofit staff are increasingly being tasked with tracking hours across projects, programs, and clients, whether working onsite or remotely. Harvest, one of the most popular time-tracking applications in use today, can help! You’ll learn how Harvest enables users to track their time across grants, projects, tasks, and budgets, even generate invoices and sync them with QuickBooks Online.

### Streamline Internal Conversations with Slack

*Thursday, Dec. 12 from 2 – 4 p.m.*

Today’s communications barrage across multiple platforms; it can be easy to lose track of important internal conversations. Slack aims to replace your organization’s inter-office emails, chats, texts, etc. with a robust instant messaging platform that organizes and stores companywide, one-on-one, and/or team messages along with associated links and attachments. Slack can be used on desktop, tablet, and smartphone devices so conversations can continue while employees are on the go. In this session, we’ll take Slack for a hands-on spin, and explore how a local nonprofit is using Slack to realize productivity gains.

INSTRUCTOR: Garrett Cooper, BenefitMany

FEE: \$40 per session (Asana, Harvest, Slack) OR \$75 for all 4 sessions



# TECHNOLOGY CLASSES

## Search Engine Optimization for Nonprofits

Thursday, Oct. 17 from 9 a.m. – noon

SEO copywriting makes a massive difference in your nonprofit marketing, resulting in more consistent leads without as much time spent marketing. Smart SEO copywriters spend hours researching, preparing, and planning their topics before they start writing and marketing. Bring your laptop as we dive deep (hands-on) into your target market's psyche to connect with your target customers, volunteers and donors and focus on the keyword research and content creation as the basis for increasing website traffic and how to know what your audience wants.

INSTRUCTOR: Dorit Sasson, SEO with Soul

FEE: \$65

## Taking Advantage of Digital Fundraising Tools

Thursday, Oct. 24 from 9 a.m. – noon

The Arts Management and Technology Lab at Carnegie Mellon University recently conducted a national benchmarking study of nonprofit use of four emerging digital fundraising tools: SMS, Facebook Nonprofit, Peer-to-Peer and Mobile bidding technologies. This class will present the findings and work with attendees on strategizing how to invest in these tools, including workshop time to apply for Facebook Nonprofit status, investigate the leading vendors for each of the remaining three tools, and discuss a flow chart of options for which tool is right for your organization's mission, donors and staff. This will be a hands-on class, so bring your laptop, or feel free to borrow one from the BCNM laptop lab.

INSTRUCTOR: Dr. Brett Crawford, Carnegie Mellon University

FEE: \$65

## EXCEL DAY

### Introduction to Excel

Wednesday, Oct. 30 from 9 a.m. – noon

Learn Excel basics in the morning session including worksheet creation, formula creation, cell formatting using "mouse pointers," absolute cell references, and printing your worksheet.

### Intermediate Excel

Wednesday, Oct. 30 from 1 – 4 p.m.

Learn more about Excel in the afternoon including worksheet templates creation and use, using functions, creating links between worksheets, database features, and chart creation and formatting.

INSTRUCTOR: Sarah Thurston, Allegheny Department of Human Services

FEE: \$65 per session or \$115 for both sessions

## Data Visualization Building Blocks

Tuesday, Nov. 5 from 9 a.m. – noon

Data visualization doesn't have to be scary. Microsoft Excel offers a large number of charts and graphing tools that complement its data analysis toolkit. This session offers an introductory, practical guide to over 20 useful Excel charts and graphs for data visualization. Bring your laptop (or borrow one of ours) for a hands-on review of the key principals of data visualization best practices and we'll help you visualize more of your nonprofit data to help tell your story to your funders, board members, and donors. You'll learn how to adjust text and cell formatting, change the chart type and axes, and how and when to implement different chart types – including basic bar and pie charts, scatter plots, histograms, and sparklines. Plus, learn how to create geospatial heat maps and 3D power maps.

INSTRUCTOR: Alex Heit, VISIMO Consulting

FEE: \$65

## Putting LinkedIn to Work for You

Wednesday, Nov. 13 from 2 – 4 p.m.

Enhance your LinkedIn presence and put this vital platform to work for your career and organization. HR professionals and nonprofits consider this ever-growing online community essential for recruitment and awareness raising. Today, your profile is your resume. This session provides knowledge for maximizing your visibility by maintaining a stellar profile, getting references, contributing posts, and strengthening connections. Learn tips to mine LinkedIn resources for professional development, marketing, and more. Please bring a laptop and arrive with your basic profile set up.

INSTRUCTORS: Lynette Asson and Yvonne Hudson, New Place Collaboration

FEE: \$40

## Advanced Excel

Wednesday, Nov. 20 from 9 a.m. – 4 p.m.

The deeper you go into Excel, the more directions you can pursue. In this full-day class, we'll have plenty of time to go beyond the typical functions and into more magic, time-saving techniques you may not have used before. We'll cover creating links between sheets, text manipulation, pivot tables, advanced formulas and customizing charts beyond the wizard. This session will combine context for techniques, guided practice and ample time for questions.

INSTRUCTOR: Sara Thurston, Allegheny Department of Human Services

FEE: \$125

# STAFF BIOS

**Peggy Morrison Outon** is the founding Executive Director of the Bayer Center for Nonprofit Management at RMU, and now serves as Assistant Vice President for Community Engagement and Leadership Development at Robert Morris University. She is also the founding Director of the Centers for Effective Nonprofit Management in Austin, Texas, and New Orleans, and the founding board chair of the Alliance for Nonprofit Management. A nationally noted consultant, fundraiser, and trainer, Peggy has worked with more than 1,000 nonprofit clients and with the help of many people, helped organizations raise in excess of \$40 million. She served as founding member of the Drucker Foundation's international training team and as a trainer. She has been an active community volunteer, serving on 33 community boards and countless committees. In August 2006, she was named to the national Nonprofit Times Top 50 for Power and Influence and has been recognized locally by several organizations, including the Girls Scouts and Pittsburgh City Council.



**Shelby Gracey** is Office Coordinator at the Bayer Center for Nonprofit Management at Robert Morris University, responsible for keeping the center's office functions flowing smoothly. After receiving an A.S. from Lake-Sumter Community College, as well as certification as a professional secretary, she went on to work in healthcare public relations, word processing, and computer support. Shelby is also organist and director of music at Sunset Hills United Presbyterian Church, where she coordinates and plays music for church services, and directs the adult, children's, and handbell choirs.



**Jennifer Pease** is Program Specialist, Covestro Center for Community Engagement at Robert Morris University, and manages the BoardsWork! and SkillShare operations, in addition to telling the story of the communities they bring together. She is president and founder of Senior Pet and Animal Rescue and an advisory board member of her local YMCA. Jen has held leadership positions with Humane Animal Rescue, Steel City Road Runners Club, WYEP radio, Family House, Hello Bully, and St. Paul Cathedral. She holds a degree in English writing from the University of Pittsburgh, maintains a public and professional writing certificate, and plans to pursue a master's degree in nonprofit leadership at Robert Morris University.



**Carrie Tancraitor** is Associate Director at the Bayer Center for Nonprofit Management at Robert Morris University, responsible for the collection and analysis of customer, demographic, and survey data. She also contributes original research to various studies on the nonprofit sector. Carrie was a Schreyer's Scholar at The Pennsylvania State University, holds a master's degree in public administration from the University of Delaware and a doctorate from Robert Morris University. An active volunteer, she is a marathoner and proud parent to three spirited boys.



**Susan Loucks** is Senior Consultant, Organizational Development and Strategy at the Bayer Center for Nonprofit Management at Robert Morris University. A longtime resident of Boston, she has worked as an organizational development consultant for nonprofits independently and with the Human and Institutional Development Forum in Bangalore, India. Particular areas of focus include transitions (e.g. leadership, business model, size), efficiently and effectively involving people in organizational improvements and systems development, and communication/conflict. Susan holds a master's degree from the University of Michigan, a bachelor's degree from Wellesley College, and a certificate in Grassroots Development and NGO Management from the School for International Training.



**Carrie Richards** is Programs Team Leader at the Bayer Center for Nonprofit Management at Robert Morris University, where her favorite roles are playing BoardsWork! matchmaker, crafting the educational catalog, and teaching undergraduate students in RMU's Nonprofit Leadership Association certificate program. A Northsider and proud owner of a rescued pit bull, she's a member of Elks Lodge #339 and Board President for Allegheny Goatscape. Carrie is an RMU alumna with master's degrees in nonprofit management and human resources. She and her husband Bradly love exploring National Parks with their dog, Kitty, and visiting Disney World as often as possible.



**Yvonne Van Haitsma** is Associate Director, Covestro Center for Community Engagement at Robert Morris University and began working with the Bayer Center for nonprofit management in 2000, initially working with nonprofit organizations on collaboration planning, strategic planning, and board development. Now she works building collaborations between companies and nonprofits, creating win-win-win relationships that build nonprofit capacity, corporate social responsibility, employee engagement, and purpose-driven opportunities for companies and their workforce. She manages the Executive Service Corps, SkillShare, and BoardsWork! Yvonne earned her M.S.W. in Community Organizing and Nonprofit Management at the University of Pittsburgh and has worked with nonprofits in Pittsburgh, Ecuador, and El Salvador.



**Evie Gardner** is Senior Consultant, Organizational Development and Finance at the Bayer Center for Nonprofit Management at Robert Morris University. She has teamed with an array of regional clients to enhance governance and evaluation practices, clarify organizational strategy, and increase diversified revenues. Her integrated approach assists nonprofit leaders in using data and numbers to drive strategic decision-making. Evie holds a B.A. from the University of Wisconsin-Madison and master of public administration degree from the University of Pittsburgh. She was the 2012 Heinz Endowments Graduate Fellow, is an AmeriCorps alumna, and is the President of the board of Bricolage Production Company.



# INSTRUCTOR BIOS

**Dr. Yinka Aganga-Williams** has over 30 years' experience working with diverse populations including immigrants and refugees from all over the world. Her work through the British Commonwealth as an international civil servant covers global perspectives on policy, programming and development focused on women and youth in 21 countries in Africa and the Islands of Mauritius, Cyprus and Malta. Dr. Aganga-Williams is currently, the Executive Director of Acculturation for Justice, Access and Peace Outreach (AJAPO), a refugee resettlement agency in Allegheny County.

**Feyisola (Feyi) Alabi** is the Special Initiatives Manager for the Office of Mayor William Peduto. A Nigerian-American, her work enables her to build bridges across cultures as she oversees the Welcoming Pittsburgh Initiative – an immigrant, refugee and internationals integration strategy for Pittsburgh and the Sister Cities project – a cultural, educational and economic development collaboration with cities across the world. She also represents the Office of Mayor Peduto in coordinating local preparation for the 2020 Census. Feyi holds a bachelor's degree in economics from the University of West Georgia, masters' degrees in business administration and sustainability from Chatham University, and a Women in Leadership certificate from CORO Pittsburgh.

**Lindsay Andrews**, CPA and Partner, Audit & Assurance at Louis Plung & Company has experience in accounting, audits, reviews, and compilations with nonprofits, construction companies, manufacturing companies, and various other small businesses, and helps them get the most value out of their auditing processes. Lindsay also provides employee benefit plan accounting and audit services. She strives to ensure clients achieve increased efficiency and effectiveness by helping them improve their general financial knowledge and understanding of generally accepted accounting principles. Lindsay graduated cum laude from the University of Pittsburgh with a bachelor's of science and business administration, accounting major and a certificate in international business.

**Lynette Asson**, principal of New Place Collaborations, is an events and marketing maven who creates powerful marketing strategies for businesses and nonprofits. She produces events ranging from intimate receptions to large convention center shows. Lynette worked as national production manager for the International Beauty Show. Her expertise includes adult learning, artist relations, and trade show management for international corporations Goldwell/KMS, Wella, and Redken. This johannes factotum enjoys working with Pittsburgh-area nonprofits and corporations, including the Bayer Center for Nonprofit Management and its clients, as well as Crisis Center North and Animal Protectors of Allegheny Valley.

**Dr. Sheila Beasley** is the Pittsburgh Partnership Specialist for the United States Census Bureau, responsible for increasing public awareness and complete count participation in the 2020 Census. She is also a professional trainer in a wide range of topic areas including marketing, diversity and multiculturalism and personal/professional leadership. Sheila is a winner of the Pittsburgh Women of Excellence award presented by the New Pittsburgh Courier and Who's Who in Black Pittsburgh in 2015. She holds a bachelor's degree in marketing, a master's degree in communications and recently completed a Ph.D. in sociology and community engagement from the University of Pittsburgh and Point Park University.

**Dave Bindewald** is Founder and Director of the Center for Play and Exploration. His training in Education, Theology, Psychology, and Philosophy have led him to a fascination with the power of curiosity to unlock potential in people and organizations. His experiences with the Center have convinced him that human life and work can be an act of playful exploration. He loves old couples, being surprised, and the rock and roll.

**Stacy Bodow** is the Community Engagement Manager for Global Links, a medical relief and development organization dedicated to supporting health improvement initiatives in resource-poor communities and promoting environmental stewardship in the U.S. healthcare system. Stacy's main responsibilities include education and outreach for the organization, as well as special projects to engage volunteers. Prior to joining the Global Links team, Stacy spent 15 years with Visions Service Adventures leading monthlong international service learning programs for groups of teenagers where she still works facilitating intensive training workshops. Stacy holds her M.Ed. from University of Pittsburgh in social and comparative analysis in education.

**Patricia Bucek** is National Director of Marketing and Talent Attraction at Vibrant Pittsburgh, responsible for overseeing the organization's employer relationships and managing the promotion of outreach initiatives to diverse talent both locally and nationally. She was recently named to the Pennsylvania Commission for LGBTQ Affairs and serves as a board member for Allegheny Goatscape. She comes to Pittsburgh from the Harrisburg Regional Chamber and Capital Region Economic Development Corporation where she served as Vice President. She was the Executive Director of the Kidney Foundation of Central Pennsylvania, the Director of Business Development for Senior Health Management and a Program Director for UPMC Pinnacle.

**Stephanie Bucklew** has over twenty years' experience in enterprise risk management with a concentration in the financial services industry, serving primarily as a risk manager and consultant. Her ultimate goal is to provide services to advance the mission of nonprofits by cutting expenditures and adding to the bottom line.

**Joel Burstein**, the owner of Keep It Simple Training and Development, is a savvy entrepreneur with 19 years of business development experience. In 2016 Joel partnered with Sandler Training to provide a selling method shrouded in simplicity. Joel earned his bachelor's degree in less than 4 years from The University of Miami. He then went on to achieve several professional certifications from NYU along with completing a prestigious, invite only program, at Wharton University of Pennsylvania. Joel's Keep It Simple approach to business development has earned him three "40 under 40," most recently The New Pittsburgh Courier's "Fab 40."

**Wendy Burtner** has more than 25 years' experience managing and growing foundations and nonprofit organizations. Before moving back to Pittsburgh to join Steeltown, Wendy led the Capital Region Collaborative in Richmond Virginia, was Executive Director of the Virginia Breast Cancer Foundation, COO of Comfort Zone Camp, founding Manager of the CarMax Foundation, and the Director of Grantmaker Services for GuideStar. In addition to her role as CEO of Steeltown, she is an independent consultant to start-up businesses, foundations and nonprofit organizations. Wendy grew up in Butler, PA and graduated from Chatham College.

**Matt Carter** is a Director at Grants Plus in Cleveland, OH with experience in grant development, corporate giving, individual fundraising, government relations, policy analysis, and project management. He previously served as Associate Director of Development, Foundations and Grants, at the Western Reserve Historical Society, and as Director of Development at Family Promise of Greater Cleveland. He has been published in international journals and co-authored the book, *Seen But Not Heard: Strengthening Nonprofit Advocacy*. Matt serves on the board of the AFP Greater Cleveland Chapter and holds a BA in Political Science from the State University of New York at Buffalo.



# INSTRUCTOR BIOS

**Chris Cooke** is the Executive Director of PULSE, a nonprofit organization that invites talented university graduates to partner with nonprofits for a year of service and leadership. During the past 20 years, the California native has worked in Pittsburgh in a number of nonprofit roles from teaching and training to fundraising and program development. Since 2009, Chris has spearheaded significant program expansion and growth at PULSE. He is on the Advisory Board of the Bayer Center for Nonprofit Management and a member of The Partnership Network.

**Garrett Cooper** has spent years immersed in the financial, nonprofit, and technology sectors. Today, Garrett is the CEO of BenefitMany, a web and mobile app development agency with offices in Pittsburgh, Reno, and San Diego. BenefitMany helps small businesses, startups, and nonprofits to bring their app ideas to fruition. Prior to BenefitMany, Garrett was the COO of MortarStone, a leading donor analytics software provider to churches. Garrett holds degrees in finance (B.S. and M.S.) and nonprofit management (M.S.) and is a graduate of Academy Pittsburgh. He is also the founder and Chairperson of The Robert M. Rodrigues Fund, a nonprofit that gives back to his high school community.

**Brett Ashley Crawford**, Ph.D., Associate Teaching Professor, teaches at Carnegie Mellon University and serves as the Executive Director of the Arts Management and Technology Laboratory. Her research and consulting interests circulate in the realms of audiences, engagement, stakeholder participation, external relations, gender and management, 21st century management systems and technology. She holds an M.F.A. in arts administration and a Ph.D. in theatre history and criticism. She has 25 years of professional theatre experience as an AEA stage manager, director, writer, and theatre manager and has served as managing director for three institutions. She presents lectures and workshops to international and domestic audiences.

**Luci Dabney**, Executive Director of PACE, has an eclectic and general professional background in both the for-profit and nonprofit sectors. Her areas of specialty include organizational assessment, strategic and business planning, program development and evaluation and resource development strategy. An experienced consultant, facilitator, public speaker and trainer, she is the former Executive Director of the Cultural Arts Council of Houston and Harris County where she supervised an annual grants budget of over \$7 million. Luci earned her bachelor of business administration from the University of Michigan and a master of business administration from the University of Houston.

**Kelci Degnian** is Communications & Connections Coordinator, Allegheny County Library Association (ACLA). In her role she works to bring benefit to Allegheny County libraries through various county-wide projects and partnerships. Kelci serves as a subcommittee co-chair on the City/County Complete Count Committee and serves on the Jefferson Collaborative Census Leadership Team.

**Joseph M. Delisi**, CPA, is an Accounting & Assurance Principal at H2R CPA who specializes in nonprofit accounting and auditing. With more than 30 years of accounting experience, his areas of focus include audits of nonprofit organizations, Single Audits, program audits, budgeting, internal control analysis and financial reporting practices. In addition to providing interim and year-end accounting and tax services to clients, Joe also serves as a technical reviewer of financial reports issued by the firm to ensure compliance with the firm's quality and professional standards. Joe holds a Bachelor's Degree in Accounting from Duquesne University.

**Samantha Ellwood** is Executive Director of Providence Connections, where, during her tenure, the organization has expanded program offerings and moved to a Keystone STAR 4 center. Through her efforts at Providence Connections and advocacy opportunities, she works to further the conversation on increased access to high quality early childhood education to all families, while also ensuring adequate childcare subsidy funding to support the work of early childhood professionals. Samantha, a Pittsburgh native, holds a Bachelor of Arts in Communications degree from the University of Pittsburgh-Johnstown and a Master of Science degree in Instruction, Curriculum, and Assessment from Drexel University in Philadelphia.

**Jeremy V. Farrell**, Esq. is a trial lawyer who helps employers with the many legal issues they encounter in the workplace. In addition to representing them in court and before administrative agencies, he assists them with the day-to-day legalities of managing a workplace, including complying with the Americans with Disabilities Act and Family Medical Leave Act; reviewing pay practices; preventing and investigating discrimination and harassment claims; drafting non-compete, non-solicitation, and confidentiality agreements; revising employee handbooks and workplace policies; handling claims for unemployment compensation; and offering guidance on personnel matters, such as terminations and other disciplinary issues.

**William Ferguson** joined HB Retirement in 2014 after a career with Merrill Lynch, PNC Bank, and D.B. Root & Company. He works with nonprofits to offer a well-protected, well designed, and outcome focused retirement plan. As an individual advisor, Will works with employees to set and reach financial goals, creating a plan that addresses the stages and concerns of a financial household. He holds his series 6, 7, 63, and 66 registrations with LPL financial, and is licensed in Pennsylvania for life, accident, and health insurance. Will maintains the Accredited Investment Fiduciary® (AIF®) designation.

**Dr. Peter Gabriel**, is an expert in professional coaching, leadership development, and emotional intelligence with Key Leadership LLC. He is an Associate Certified Coach (ACC), a coaching designation through the International Coach Federation and President of the International Coach Federation of Pittsburgh. Peter has extensive experience in the corporate environment. Prior to Key Leadership LLC, Peter spent 19 years working with corporate clients at Vanguard, a global investment manager. He completed his Doctor of Education in Leadership at Creighton University. His dissertation focused on gender, diversity, and leadership and was presented at the International Leadership Association Global Conference in West Palm Beach, FL in 2018.

**Phyllis G. Hartman**, SHRM- SCP, SPHR, is founder and President of PGHR Consulting, Inc. with 30+ years' experience in HR. She is a member of the SHRM Expert Panel and a member of the Government Advocacy Team. She has an MS in HRM, La Roche University and is a certified Senior Professional in HR. Phyllis has written numerous articles and three books, "A Manager's Guide to Developing Competencies in HR Staff," "Looking to Hire an HR Leader?" and "Never Get Lost Again: Navigating Your HR Career." She is HR Captain of BCNM's "Ready to Compete" program and a past Board of Trustee member for the Homeless Children's Education Fund.

**Alex Heit** is the Principal of Partnerships & Strategy at VISIMO Consulting, and has over ten years' experience in data analysis and visualization and volunteers his time as a board member at NeighborWorks Western Pennsylvania, Jewish Residential Services, and Rodef Shalom Congregation. He previously worked for Carmeuse North America, NeighborWorks America, Allegheny County Department of Human Services, and The Elie Wiesel Foundation for Humanity. Alex holds a bachelor's degree in International Studies from Rhodes College and a master's degree in Public Policy Analysis from the University of Pittsburgh. Alex lives in Squirrel Hill with his husband, Harris, and their orange tabby, Brando.

# INSTRUCTOR BIOS

**Lizz Helmsen**, Managing Director at Carter, combines 20 years of fundraising experience with a background in the arts, education, and community service. She is known as a creative and energetic professional with a proven ability to build relationships with, and create connections among, multiple constituencies. Lizz has directed comprehensive fundraising programs and provides expertise in the areas of campaign counsel, major gifts, development planning, governance, annual giving and grant making.

**Yvonne Hudson**, principal of New Place Collaborations, is a versatile marketing/PR expert who creates mission-driven solutions for nonprofits and businesses. She directed higher education communications for Carnegie Mellon, Chatham, New York Law, Yeshiva University, and University of Pittsburgh Theatre Arts. Her work in New York, DC, and Pittsburgh includes projects for the Bayer Center for Nonprofit Management and its clients, Crisis Center North, Pittsburgh in the Round, and Shakespeare organizations including The Folger, The Shakespeare Society, and Pittsburgh Shakespeare in the Parks. A journalism/psychology alumna of Point Park University, Yvonne earned an M.A. in arts management and developed her solo show, *Mrs Shakespeare*, at Pitt.

**anupama jain** is the founder and principal consultant of Inlusant, specializing in cross-sector diversity and inclusion education, with an emphasis on community building, cultural competency, global awareness, and social justice. anu focuses on collaborative community organizing and public humanities initiatives in Pittsburgh, partnering with diverse local groups and designing original programming. She continues to teach at the University of Pittsburgh in the program for Gender, Sexuality, and Women's Studies on topics such as Gender & Leadership and Feminist Theory. She earned her undergraduate degree at Bryn Mawr College and a PhD in literary and cultural studies from the University of Wisconsin-Madison.

**Wayne A. Jones** is the Owner and Principal of Wayne A. Jones Consulting with experience in designing, implementing, and assessing strategies, operations and learning activities in the civic sector. With 15 years of progressive leadership at The Heinz Endowments in Pittsburgh, he is skilled at connecting information, systems, and programs to create innovative solutions to tough problems. Preferring inclusive change management methodologies to improve organizational strategy, culture and teamwork, Wayne is able to use such tools as the Organizational Culture Assessment Instrument, Appreciative Inquiry, and Hofstede's Cultural Dimensions and Predictive Index. He earned his MBA from Yale University and his Master of Science in Organization Development from Pepperdine University.

**Emma Kieran** brings more than 16 years of fundraising experience to Pilot Peak Consulting. She has worked with over 50 nonprofits in her career as a coach, teacher and change agent. Previously, Emma was the Vice President for Fundraising and Development at Orr Associates, Inc. (OAI) and a consultant with Changing Our World (CW). Emma holds an M.A. from Columbia University in organizational psychology, an M.P.A. from American University in nonprofit management and a B.A. from Connecticut College. Emma is a dedicated volunteer for The Ellis School for Girls, her alma mater, and for Girls on the Run.

**Hannah Locop**, Program Manager at the Greater Pittsburgh Nonprofit Partnership was born and raised in South Florida and is a first-generation Filipino American. A graduate of the University of Florida with a BA in political science, Hannah interned everywhere from the campaign trail to Congress, discovering her strength as an advocate connecting people to policy. At GPNP, Hannah supports the nonprofit community of southwestern Pennsylvania through education, policy and advocacy, and organizing convenings such as the 2019 GPNP Summit. Ask her about her most recent trip to the Philippines, her affinity for the ocean, and her fondness for food.

**Mark Lynch**, principal of Mark J. Lynch and Associates, LLC, has more than 30 years of experience in fundraising, communications, marketing and branding, and organizational development for nonprofit organizations including fundraising consulting through Ketchum, Inc., and A.L. Brouman Associates, Inc. Mark is a registered fundraising consultant in Pennsylvania and West Virginia. He is active in the community, currently serving on the Community Advisory Board of the Allegheny Regional Asset District, and has served on many other committees and boards for nonprofit organizations including Support Inc. and the Sewickley YMCA. He is a graduate of Leadership Pittsburgh, Class XIII.

**Frederick A. Massey, Jr.** is a CPA and President and CEO of Familylinks, Inc., a human services agency that provides family-centered services focused on behavioral, social, and developmental health issues. He received his Bachelor of Science degree in Business Administration and Accounting from Duquesne University and is an ordained minister at The Life Church in Homestead, PA. Fred has written three books and has coordinated prison ministry as an outreach effort. Fred serves as the Supervisory Committee Chairperson for the Hill District Federal Credit Union and on the board of directors for the Pittsburgh affiliate of Communities in Schools and a director on The Mentoring Partnership of Southwestern PA.

**Kevin McGuire** has directed and worked with nonprofit educational agencies for 25 years. As a Pittsburgh School District Principal, his schools have earned academic awards for excellence and student academic achievement. Kevin has written numerous grants and has been awarded over ten million dollars in funding for nonprofits. As a 21st Century CCLC grant evaluator he works closely with his nonprofit clients to ensure they get targeted results.

**Jessica Mooney** is Manager of Special Projects for Allegheny County, responsible for assisting the Director of Community Relations & Special Projects in interfacing with communities on issues relating to trails, education, veterans affairs and municipal issues, and is engaged in the Census 2020 efforts at the county level. Her passion for communities and land use coalesce in her involvement with the Allegheny Land Trust where she has been on the board since 2007. Jessica holds a BA in urban studies and anthropology from the University of Pittsburgh and a MS in public policy and management from Carnegie Mellon University.

**Bhavini Patel** is the CEO and co-founder of beamdata, which merges data science with social issues to build accessible data tools for community organizations. As a Pittsburgh native, Bhavini serves as the Vice Chair of the Edgewood Democratic Committee. She also volunteers her time on the Boards of several nonprofits including the Bhutanese Community Association of Pittsburgh and Civically Inc, which is a Wilkensburg-based nonprofit dedicated to community development. She is a graduate of the University of Oxford and was recognized as 30 Under 30 by the Pittsburgh Business Times and The Incline's Who's Next: Politics 2018.

**Julie Pfaltzgraff** is the Volunteer Engagement Manager for Global Links, a medical relief and development organization dedicated to supporting health improvement initiatives in resource-poor communities and promoting environmental stewardship in the U.S. healthcare system. Julie spends most of her time working with the 4000 amazing volunteers who pass through the doors at Global Links each year. Prior to joining the Global Links team, Julie spent 15 years working in sleep research and clinical sleep studies. Julie is a returned Peace Corps volunteer and holds a bachelors degree from Chatham University.

# INSTRUCTOR BIOS

**Mary Anne Poutous** is Chief Executive Officer for Transitional Services Inc., which provides residential and supportive services to individuals with psychiatric and intellectual disabilities. She is a licensed clinical social worker and a seasoned administrator with experience in operational, project and fiscal management whose work has ranged from child/family health and mental health services, community education, prevention and administration. She is a trainer on Quality Management and Performance Improvement and has a passion for assisting organizations with incorporating performance improvement into the work they do every day. Mary Anne has a master's in Clinical Social Work and a certificate in Human Resource Development and Training.

**Anthony Preston** guides clients through the strategic growth and scaling process by focusing on strategic micro-planning and program design. As a co-founder of ISA Learning, Anthony was pivotal in growing the company revenue ten-fold in four years and taking seven products from idea phase to market. Through his experiences as an entrepreneur, small business owner, and company founder, Anthony understands the risks and uncertainties of starting a new operation and scaling an existing one. He recognizes the importance of marketing, customer service, and accountability, developing a roadmap, and executing the necessary steps for growth.

**Dr. Geri Puleo**, is President/CEO of Change Management Solutions, Inc., an eLearning and coaching company dedicated to eradicating workplace burnout in order to build employee resiliency and the creator of the Burnout During Organizational Change (B-DOC) Model, a research-based solution that defines the descent and recovery of workplace burnout. A frequent and popular keynote speaker, her TEDx Talk on *Burnout v. PTSD: More Similar Than You Think* has been viewed over 300,000 times on YouTube. Holding both SPHR and SHRM-SCP senior HR certifications, she has been an entrepreneur for over 25 years, an author, blogger, career coach, university professor, and researcher.

**Dr. Michael Quigley** is Assistant Professor of Organizational Leadership at Robert Morris University where he serves as Co-Chair of the Race and Ethnicity Committee, as Coordinator of Culturally Responsive Practices and is faculty advisor for the RMU Collegiate 100 Black Men. Born and raised in Pittsburgh's Hill District, Michael earned his bachelor's, master's, and doctoral degrees from The University of Pittsburgh. He serves as board chair for Brothers and Sisters Emerging and serves on the advisory boards of Pittsburgh Public Schools "We Promise" initiative, the Greater Pittsburgh Higher Education Diversity Consortium, the YWCA's Race and Gender Equity Advisory Committee, the Adonai Center for Black Males, 5A Elite Youth Empowerment, and the Pittsburgh/Allegheny County Mayoral/County task force for the My Brother's Keeper Alliance.

**Debra Ries** has been a CPA for more than 30 years, specializing in tax compliance and consulting services for tax-exempt organizations for more than 17 years. She has experience with significant tax technical issues unique to exempt organizations, including educational institutions, hospitals, museums, foundations, country clubs and social service organizations. Debra is a member of the AICPA, PICPA and Allegheny Tax Society, and she serves on the PICPA Pittsburgh Chapter Executive Committee, Western Pennsylvania Tax Conference Committee, and Taxation Committee. Debra has served on boards of various nonprofit organizations over the years and is currently a board member for Residential Resources, Inc.

**Melanie Rutan** works with a wide variety of nonprofit clients at Bookminders, where she serves as an accountant and trainer. She received her B.S. in Business Administration with an emphasis in accounting from West Virginia State College in 1988 (Summa Cum Laude). Melanie was an Examiner-InCharge with the Federal Deposit Insurance Corporation (FDIC) for 11 years before joining Bookminders in 2001.

**Jack Ryan** is a retirement plan advisor who assists nonprofits to develop and design best in class retirement plans for their employees. Jack also monitors for legislative and regulatory changes that impact the retirement industry to ensure our clients are fully compliant with these new laws. Jack holds a finance degree from Duquesne University, along with an MBA and Law Degree from the University of Pittsburgh. Additionally, he holds his series 7 and 66 registrations with LPL financial, and is licensed in Pennsylvania for life, accident, and health insurance. He also maintains the Accredited Investment Fiduciary® (AIF®) designation.

**Dorit Sasson**, a former ESL educator, is an award-winning author and a certified SEO copywriter who works with B2B and B2C audiences and the nonprofit world. Her sweet spot is helping authorpreneurs and entrepreneurs market themselves with keyword-driven content creation.

**Edward G. Scherer**, CPA, is an Accounting & Assurance Partner at H2R CPA, and is the Partner-in-Charge of the firm's Nonprofit Services group. With over 30 years of accounting experience, Ed concentrates his practice in accounting and auditing for nonprofit organizations and closely held businesses, as well as management consulting and business advisory services. Ed's industry specialties include manufacturing, technology, higher education foundations and nonprofits. Ed holds a Bachelor's Degree in Economics from Allegheny College.

**Arthur M. Scully**, Managing Director at Carter, is well known for his ability to cultivate strategic thinking and creative partnerships that result in exceptional philanthropic experiences. Over the course of his 30 year career, and in partnership with colleagues, trustees and volunteers, he has successfully led development programs, established supporting organizations and facilitated mergers to increase organizational impact.

**Stephen Shope** is a business and economic development consultant. He founded his firm, Utopia, in 1994. His portfolio of work includes entrepreneur coaching, cottage industry incubation, small business growth strategies and corporate restructuring initiatives with Fortune 500 Companies. Steve is currently serving his third service appointment with the U.S. Dept. of Commerce, U.S. Census Bureau as Supervisory Partnership Specialist.

**Rekha Shukla** has been a consultant with Barbara Goldberg & Associates, LLC concentrating in evaluation, project development, and strategic planning for the past 10 years. Most recently she was a board member of the Eastern Evaluation Research Society which produces an annual conference for evaluation professionals and was the board president for Outreach Teen & Family Services, Inc. in Mt. Lebanon. She has more than 25 years of development and management experience gained in public and nonprofit organizations in Asia, New York and Pittsburgh. She holds a Master of International Affairs Degree from Columbia University and a Bachelor of Arts Degree from the University of Wisconsin-Madison.

**Larry A. Silverman**, Esq., has been an attorney for 40 years. After a clerkship for the Honorable Donald Ziegler of the U.S. District Court, Larry joined Dickie, McCamey & Chilcote, P.C. from 1986-2002. He then became the first VP & General Counsel of the Pittsburgh Pirates before returning to private practice in 2012, representing small businesses and nonprofits with a focus on digital law, employment law and risk management. Larry is an Adjunct Professor at Pitt's School of Law, on the board of the Neighborhood Legal Services Association and is a member of the Greater Pittsburgh Arts Council, the American Corporate Counsel Association and the Sports Law Association.



# INSTRUCTOR BIOS

**James R. Sismour Jr.** has 29 years of experience building major gift relationships with donors in higher education, hospitals, and religious organizations. Currently he is a gift and charitable estate planning officer for the business schools at Pitt and he is a fundraising service provider for a select group of nonprofits across multiple sectors. Jim graduated from Gannon University in Erie. He is a board member of the Pittsburgh Planned Giving Council, Cardinal Wuerl North Catholic High School and the Edgewood Foundation. Jim and his wife Jeanine have five children living across the United States, from Philadelphia to San Francisco.

**Andréa Stanford** is Assistant County Manager for Allegheny County. She is past president of the YWCA Greater Pittsburgh Young Leaders Board, a former Partner in the Social Venture Partners Pittsburgh network, serves on the board for the Kelly Strayhorn Theater and volunteers with Strong Women, Strong Girls. Andréa was a 2017 recipient of the Greater Pittsburgh ATHENA Young Professional Award, which recognizes an emerging leader who demonstrates excellence in their profession, contributes to their community, and helps other women succeed through mentorship. Andréa graduated cum laude with a Bachelor of Science in Business Administration degree from the University of Pittsburgh.

**Tom Sullivan** is a Leadership & Organizational Development Consultant with ProGrowth Associates, LLC, Pittsburgh PA. He has many years of service in key human resource positions creating solutions for executive learning, talent assessment and succession planning. Tom works closely with senior management teams as a trusted advisor serving in a variety of corporate, health care, and nonprofit industries. He is an accredited facilitator for multiple leadership and team development models, and has conducted seminars throughout North American and in Europe. Tom has a master's degree in Public Administration from Long Island University, NY and a Bachelors in Social Work from Kean University, NJ.

**Rabbi Ron Symons** serves as the Director of the Jewish Community Center of Greater Pittsburgh's Center for Loving Kindness, dedicated to redefining 'neighbor' from a geographic term to a moral concept. He is driven to work on Census 2020 because every neighbor counts and every neighbor should be counted!

**Sarah Thurston** is the Manager of Data-Driven Models at the Allegheny County Department of Human Services. She has been with the County for 10 years in various roles ranging from Data Analyst to Quality Assurance Director for a federal grant program. In all these positions, data has played a central role in decision-making and evaluation of human service effectiveness and outcomes – ideal for Sarah's strengths of logical, linear thinking. Outside of work, she enjoys time with her family and volunteers with Big Brothers Big Sisters in the Mentor2.0 program and with the Community Advisory Board of WQED.

**Dave Tinker**, CFRE, FAFP is Vice President of Advancement at ACHIEVA and an adjunct professor of informatics at Muskingum University's Master of Information Strategy, Systems and Technology (MISST) program. A certified Association of Fundraising Professionals (AFP) Master Trainer, he was honored by AFP International as one of the first six Distinguished Fellows. Dave received an M.P.A. with a concentration in nonprofit management from the Lilly Family School of Philanthropy at Indiana University. He received a B.A. in chemistry and English and an MISST from Muskingum University. He is also a graduate of Leadership Works – Indianapolis, Class III.

**Trina Walker** is the Lead Consultant for TLW Strategy, a consulting firm designed to help nonprofits create efficiencies in their plans, people and processes so they can have a greater impact. Trina has more than 25 years of nonprofit leadership, strategy and marketing experience in healthcare, advertising, consulting, education, religious and cultural organizations. She has helped organizations with strategic planning, organizational change, staff development, fundraising, marketing and communications. Prior to launching her own consulting company, Trina served as Director of Communications and Creative Services at Carnegie Library of Pittsburgh, and Director of Marketing and Outreach at the University of Pittsburgh's College of General Studies.

**DeWitt Walton** is a 25-year employee of the United Steelworkers, currently assigned to the Civil & Human Rights department where his responsibilities include increasing union membership and strengthening the historic link between organized labor and the Minority community. He serves as Vice President of the Pittsburgh A. Philip Randolph Institute, is a board member of the Thelma Lovette/Centre Ave YMCA, Three Rivers Waterkeepers and Schenley Heights Development Corporation. DeWitt lives in the Hill District and serves as the District 10 Representative on the Allegheny County Council where serves on the Public Works and Public Safety committees and is Chairman of the Executive committee and the Committee on Economic Development and Housing.

**Jean Watson** is a Senior Accountant at H2R CPA with over 14 years of accounting experience. In her current role at the firm, Jean is responsible for the planning and completion of nonprofit audit engagements, including pension and 401(k) plans, Uniform Guidance and program specific audits, and for providing client management teams with recommendations for improving internal controls and financial reporting practices. Jean holds a Bachelor's Degree in Accounting from West Liberty State College.

**Joseph Zovko** joined Louis Plung & Company in 2004 and has more than 25 years of accounting, auditing and tax experience with employee benefit plans, nonprofit organizations, and large to mid-size companies. He holds extensive industry experience within nonprofit, manufacturing, construction, retail, agriculture, and real estate companies. His nonprofit clients range from volunteer health and welfare, human services, and foundations. Joe is certified to perform audits in accordance with the Uniform Guidance and Yellow Book and his employee benefit plan experience includes defined benefit, defined contribution, and 403(b) audits. He currently conducts audits for more than 20 benefit plans ranging in size from 100 participants to more than 14,000.

## Applied Research at BCNM

Based at Robert Morris University, research is second nature to the Bayer Center. We know how important it is to understand the nonprofit world in which we work, and we strive constantly to deepen that understanding for you and for our own work. When we ask you to participate in one of our research projects, please do. Your quiet reflection leads to more effective action for all of us. And, if you need assistance with research of your own, the Bayer Center for Nonprofit Management at Robert Morris University is here to help.

### Wage & Benefit Survey

When you're setting salaries, the Wage & Benefit Survey for Southwestern PA Nonprofit Organizations is the only comprehensive guide in our region. This invaluable tool gives you all the information you need to comply with IRS requirements for setting compensation packages, to remain competitive in your own retention and succession planning, and to develop organization-wide salary charts. The cost for the results is \$200 for nonprofits with budgets under \$2 million, and \$300 for nonprofits with budgets over \$2 million. Once purchased, the research can be shared with anyone within your organization. Nonprofits who participate in the survey receive the results for free.

For more information about how to purchase your copy, visit [bcnm.rmu.edu/ProgramsServices/ResearchPublications](http://bcnm.rmu.edu/ProgramsServices/ResearchPublications).

74%+  
seventy-four percent

Exploring the Lives of Women Leaders in Nonprofit Organizations

In our region, approximately 74% of the nonprofit workforce is female, yet are underrepresented in positions of leadership and they earn less than their male counterparts. In our latest study, female executives reported earning only 82% of what male executives report earning. Through the 74% research project, we examined thousands of 990 forms for Southwestern PA nonprofits to learn about local wage inequity issues. On behalf of the nonprofit workforce, 74% is leading the way to promote change through research and education.

### WHAT NOW?

#### HOW WILL THE IMPENDING RETIREMENT OF NONPROFIT LEADERS CHANGE THE SECTOR?

From the 74% research we found that local nonprofit organizations and individuals are ill-prepared for the pending retirement boom, which resulted in our most recent research project, "What Now?" This research confirms that retirement and succession planning for nonprofit organizations is scarce. How nonprofits respond to this reality will shape the future of the sector. However, despite the dismal statistics, there is optimism for change. We encourage you to continue to follow this journey as we enter the solution-building phase.

## MASTER OF SCIENCE IN ORGANIZATIONAL LEADERSHIP

### NONPROFIT LEADERSHIP TRACK or CERTIFICATE

The Master's in Organizational Leadership is an interdisciplinary degree that builds on your experience as a member of society, interacting with a wide variety of institutions to learn how to effectively develop others and accomplish organizational goals. Members of a society conduct their daily lives engaged with their educational, political, cultural, religious, commercial, familial, community and governmental organizations. These organizations require effective and flexible leaders and followers to enable members to adapt to inevitable change and maintain a well-functioning society.

Robert Morris University elevates the M.S. in Organizational Leadership by adding a nonprofit focus. Students can choose either to complete the entire 30-credit graduate degree curriculum, or enhance their credentials with a 12-credit certificate.

Both are designed for those that supervise or lead a team in the nonprofit sector or for those aspiring to do so. Students engage in courses and subjects that will enable them to acquire the analytical and practical skills necessary to effectively participate in a wide range of nonprofit positions, such as philanthropic work, program evaluation, fundraising, fiscal management, community outreach and development.

Knowledge acquired in the classroom can readily be applied to serve your community and organization. Students completing the degree or certificate add to their academic and professional development and have transferable leadership and organizational skills that are recognized and valued in both the nonprofit and for-profits sectors.

#### Program highlights include:

- Offered online or hybrid courses at RMU Downtown
- Evening courses offered at BCNM
- Curriculum designed for those that supervise or lead a team in the nonprofit sector or aspire to
- Students acquire analytical and practical skills that are transferable to a wide range of positions and organizations
- Courses taught in 8-week accelerated sessions
- Earn your graduate degree in less than two years
- 15% tuition discount for members of Young Nonprofit Professionals Network (YNPN) of Pittsburgh

Apply for free online at

[RMU.EDU/ACADEMICS/GRADUATE/NONPROFIT-LEADERSHIP](http://RMU.EDU/ACADEMICS/GRADUATE/NONPROFIT-LEADERSHIP)

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## FUNDERS

The Bayer Center acknowledges with gratitude the catalytic support received from:

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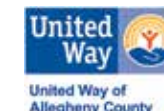
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The Bayer Center is proud to partner with:



The Bayer Center is an active member of the following organizations:





# Course Registration

The registration deadline for all classes is one week before the course begins (or the first session of a series), and all registration fees must be paid prior to the class. Online payment is preferred. If you are unable to pay online, please email [bcnm@rmu.edu](mailto:bcnm@rmu.edu) to request an invoice. Register early – space is limited. Please register and pay for courses online at [rmu.edu/bcnmregistration](http://rmu.edu/bcnmregistration).

## SCHOLARSHIPS

A limited number of partial scholarships are available to organizations demonstrating significant budget restraints. For more information, visit the education section of our website at [RMU.EDU/BCNM](http://RMU.EDU/BCNM) or call **412-397-6000**.

## WITHDRAWAL AND REFUND POLICY

A full refund will be granted if the Bayer Center is notified of withdrawal at least five business days prior to the start of the session. No refund will be granted if the individual fails to attend or notify the Bayer Center five days prior to the event. A student may transfer their registration to another member of their organization without penalty but must notify the Bayer Center at least one business day prior to the start of the session.

## CANCELLATION POLICY

The Bayer Center reserves the right to cancel any class. If a class is canceled, a full refund of tuition fees or credit toward another class will be given, per the registered student's preference. Please allow three to four weeks for processing of refunds.

## DISCOUNTS\*

### Three or more classes:

Send three or more staff members from your organization to the same class, or one individual from your organization to three or more classes, and receive a 20 percent discount on each course. Discounts cannot be applied when registering online, so please call **412-397-6000** or email [bcnm@rmu.edu](mailto:bcnm@rmu.edu) to register when using a discount.

### BOARDWORK! NONPROFIT PARTNERS:

Current board members receive a 20 percent discount on each course.

\* Not applicable for special events and convenings, clinics, conferences, and *BoardsWork!* cohorts.

## PLEASE NOTE

Registration confirmations, notices of class changes, and other critical information are conveyed via email sent from [bcnm@rmu.edu](mailto:bcnm@rmu.edu) and [gracey@rmu.edu](mailto:gracey@rmu.edu). Please check your email the morning of any class for last-minute changes or cancellations. If your email program uses a spam filter, it may be necessary to add [bcnm@rmu.edu](mailto:bcnm@rmu.edu) and [gracey@rmu.edu](mailto:gracey@rmu.edu) to your address book so that you receive updates and information.

**Note:** All classes are located at the Bayer Center for Nonprofit Management in the Heinz 57 Center at 339 Sixth Avenue, Suite 750, unless noted otherwise.