

“DO the best you can UNTIL YOU know better.

THEN WHEN YOU KNOW BETTER, do better.”

—Maya Angelou

**FALL 2020
CLASSES**



**BAYER CENTER FOR
NONPROFIT MANAGEMENT**

RMU.EDU/BCNM

Celebrating 20 Years | 2000-2020

LETTER FROM Peggy Morrison Outon

Do the best you can...

Hello, beloveds...month six of the quarantine...in my mind's eye, as I look around, I see you in your home offices and in your real offices, wearing masks and socially distant, getting work done, trying with all your might to do the best you can. What have we learned from this triple crisis of public health, racial injustice and economic disaster these last months?

What do we now know better?

Here's a few things I know better...we should not return to normal. The old normal was filled with injustice and inequity...too many people were treated with disrespect and ignored...I know that we have to do better at confronting our own roles in racial injustice. I know we must each examine our hearts and our behavior and not return to the old ways of working and thinking, seductive as that prospect is for our human brains who crave certainty and yearn for normal. Normal does not serve us.

I know that we who have chosen to give our lives to the nonprofit sector – what some call the social sector – must insist on better ways of working. We must insist our boards of directors look at bias in hiring, compensation, advancement and establish new norms, and opportunities. I know that we must listen and participate in uncomfortable conversations that help us better understand other people's perspectives and feelings. I know that bravery on all sides must be characteristic of our lives.

I know that we must advocate for more fairness in technology resources. The digital divide has never gone away. It's much more potent now as we all need to live big important parts of our lives digitally – and many are closed out of necessities because they lack the necessary technology. As a sector, and as a society, we must speak out, figure out and demand greater access to technological resources. We must do better.

I know we must support our workers on the front line. This morning, as so many mornings of the past few months, I heard an announcement on the radio of a food distribution by the Greater Pittsburgh Community Food Bank. What must it be like right now working for the Food Bank? The press of human hunger on them constantly must be quite a challenge. So many of you have pivoted on your missions, seen and sought to meet the current needs...so many of you are feeding people. How can we help you? What would be truly helpful?

Surely, this is an opportunity for improvement. When my heart hurts as it is hurting now, songs come into my mind. I hear Leonard Cohen singing his song, "Anthem."

The birds they sang

At the break of day

Start again

I heard them say

Don't dwell on what

Has passed away

Or what is yet to be

Yeah the wars they will

be fought again

The holy dove

She will be caught again

Bought and sold

And bought again

The dove is never free

Ring the bells (ring the bells) that still can ring

Forget your perfect offering

There is a crack in everything (there is a crack in everything)

That's how the light gets in.

There's a crack in everything...that's how the light gets in...

We **know** better – now we must **do** better, and if there ever was a group of people who know and do, it's you, my nonprofit colleagues...it's you. The opportunity of our life lies before us...we can, must and will do better. I know this to be true. I hope we can help you with the HOW – you've got the WHY.

Excelsior, beloveds...ever upward.



Peggy Morrison Outon

Still here...

We Moved!

The Bayer Center for Nonprofit Management has relocated offices to the Robert Morris University campus:

Benjamin Rush Center

6001 University Blvd

Moon Township, PA 15108

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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 20 years of service to the nonprofit community, the Bayer Center has completed over 2,200 consulting engagements and educated over 11,500 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, and financial 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 Helps Nonprofits to Thrive during COVID by Going Virtual

The Covestro Center for Community Engagement can help your nonprofit to thrive through partnership and programming in *BoardsWork!* and SkillShare.

Our seasoned staff and trained ESC volunteers will pinpoint areas of growth and sustainability for you, including new and diverse talent, customized organizational solutions, and strong community relationships.

Contact us today to get started, or visit our website for more information.

Nonprofits can get connected by contacting Jennifer Pease at 412-397-6013 or pease@rmu.edu.

GLOBAL LINKS, a Pittsburgh-based nonprofit, is a medical relief and development organization dedicated to supporting health improvement initiatives in resource-poor communities and promoting environmental stewardship in the US healthcare system. Recently celebrating their 30th anniversary, they have focused internally on board development to prepare the organization for many more milestone events. Global Links came to us through *BoardsWork!* seeking that development through individualized board member matching and an online retreat.

The goals of the engagement were to discuss and work on governance best practice, service growth and prioritization, response to uncertain times, and diversity, equity, and inclusion as a leader in the nonprofit social justice sector.

Their board met on Zoom with one of CCCE's skilled *BoardsWork!* facilitators. Joining the meeting was a recently matched member from the program, a passionate and thoughtful FedEx director. Global Links actively participates in all areas of both the Bayer and Covestro Centers, including consulting contracts and class participation, to which *BoardsWork!* board members receive a discount as part of their engagement.

BLUEPRINTS, a SkillShare program participant, serves as the catalyst to mobilize the resources of the entire community to enable families and individuals to attain the skills, knowledge, motivations, and opportunities to become self-sufficient. As an organization they are proud to change people's lives, embody the spirit of hope, improve communities, and make America a better place to live. Blueprints has partnered with CCCE for the past two years with teams of skilled consulting partners from local businesses to strengthen their operations.

They've been able to improve the management of their annual employee evaluation through use of an electronic performance tool through a previous SkillShare initiative. They also hope this year to develop a financial management report in the form of a dashboard that is visually appealing and informative for board members that would better support decision-making for their programming. The report would be designed to track key indicators and benchmarks related to success in operating an early childhood program.

Blueprints launched their new project in the spring but put progress on hold once the pandemic hit. They are excited to announce, however, that they've been able to continue their work with their team and the help of their ESC volunteer project advisor this summer. Program Director Brenda Fronzaglio said, "We are getting back on track with our SkillShare project and started meeting virtually. We appreciate the opportunity to be a part of the program! We are looking forward to having a better way to communicate data and monitor progress."

BOARD CHAIR CHARLES R. VARGO SAID OF THE PROGRAM...

"Global Links celebrated its 30th anniversary this past year, and we have a relatively new Executive Director who replaced a 'founding mother' in this role. Coupling that with the retirement of several veteran board members and the appointment of new directors, it made perfect sense to engage *BoardsWork!* to facilitate a retreat. While we have done a great deal to formalize roles and responsibilities at the board level, it was the right time to reflect on our roots and constancy to our mission and come to a common understanding of key organizational issues so we could chart our future course. In many ways, our goal for the engagement was a non-traditional approach to a retreat.

Our facilitator did an excellent job of working with us to develop a framework for our retreat. She was very responsive to our unique needs and approach, and she helped us to craft a meaningful agenda to prepare our board to develop its action plan. Our retreat was initially scheduled for March, but with the COVID-19 pandemic, we deferred it until June, assuming we could do it in person at that time. We deferred it again, and ultimately held it as a virtual retreat in August.

While COVID-19 presented Global Links with a number of challenges, it also created a host of new opportunities for us to

serve our local community with an expanded domestic program. Our conversations with our facilitator during these deferrals further enabled us to factor the pandemic and our response into our retreat.

Needless to say, we were apprehensive about having such an important activity virtually, rather than in person, because we were sure we would miss something by not being together in a common space. Our facilitator worked with us intently to make sure that our experience would give us what we needed. She was superb and used the background from our many conversations to produce a stimulating retreat experience. *BoardsWork!* also did a phenomenal job of supporting the technology, which enabled active participation from all our board members, including the effective use of small group chat rooms.

As I reflected on the experience with our Executive Director, Angela Garcia, we believe we were able to successfully achieve our goal to bring the board to the place where we can have the informed discussions we need to plan our actions and strategies going forward.

Thank you *BoardsWork!* for helping to get us to where we need to be!"

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 webinar 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 Bayer Center Financial Consulting, call 412-397-6000.

Designing QuickBooks for Nonprofits

Tuesday, Sept. 22 from 10 a.m. – noon

QuickBooks is both inexpensive and functional, making it a good choice for nonprofits. Join us as we teach you to set up and design your QuickBooks system to meet the complex needs of your nonprofit, including: setting up your accounting for grants, restricted funds, programs, and fundraisers. There is a question and answer portion utilizing a live data file to demonstrate and answer specific questions.

Mining QuickBooks for Nonprofits

Tuesday, Oct. 6 from 10 a.m. – noon

QuickBooks has grown to be a powerful, full-featured accounting package with the functionality of packages costing ten times as much. This seminar explores the intricacies of the QuickBooks reporting system and how to extract the information you need from this powerful management information system. There is a question and answer portion utilizing a live data file to demonstrate and answer specific questions.

INSTRUCTOR: Melanie Rutan, Bookminders

FEE: \$40 each OR take both sessions for \$65

Understanding Accounting Principles Unique to Nonprofit Organizations

Thursday, Oct. 8 from 10 – 11:30 a.m.

This class designed for nonprofit board members, Executive Directors, and management, who have a basic understanding of accounting concepts, will focus on the differences in accounting concepts between for-profit and nonprofit organizations. Topics will include recognition of contributions, impact of donor-restrictions to the financial statements, financial statement presentation differences from for-profit entities, timing of recognition of income and expenses, how recent accounting standards are impacting nonprofit financial statements, plus many other topics unique to nonprofit accounting.

INSTRUCTOR: Drew Zerick, Sisterson & Co. LLP

FEE: \$35

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

Finance Clinic

Are your financial policies ready for an update? Do you have questions about particular nonprofit accounting standards or practices? Are you or your board looking for new ways to present your financial reports? Have a few questions about your annual tax filings or whether you should get an audit even if it isn't yet required? A Finance Clinic can assist you with these questions and any other time-bound project or inquiry related to your organization's numbers.

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.

Fiduciary Responsibility as Board and Finance Committee Members

Wednesday, Nov. 4 from 10 – 11 a.m.

If you are a board or finance committee member, you may be considered an investment steward. Investment stewards are those responsible for managing investments within retirement plans, endowments, and foundations. Over the past few years, stewards have been facing heightened scrutiny from plan participants, beneficiaries, donors, charitable recipients, and regulators. It is more important than ever for you to fully understand your fiduciary responsibilities. Many investment stewards do not realize they are fiduciaries and fewer still are truly aware of the full scope of their responsibilities. Join us as we discuss what it means to be a fiduciary and how to implement the best practices as an investment steward to fulfill your obligations of this role.

INSTRUCTORS: Jared Henigin and Michael J. Ward, Wealth Management Partners, LLC

FEE: \$30

Nonprofit Operation and Financial Presentation Issues in Covid

Thursday, Nov. 5 from 10 – 11:30 a.m.

During this time of uncertainty, there are some new disclosures that nonprofits need to consider due to the current environment. Join us for an overview of Covid related operation and financial essentials including:

- Treatment of PPP Loans
- Going Concern
- Loan Modifications
- Contributions
- Connecting with supporters, constituents and donors
- Social Enterprise

INSTRUCTORS: Edward Scherer and Joe Delisi, H2R CPA

FEE: \$35

Nonprofit Management

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.

Nonprofit Management CLASSES

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Executive Director Huddles

Thursdays, Sept. 10, Oct. 8, Nov. 12, Dec. 10 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 to share experiences, challenges, solutions, and best practices. Join us as we deepen connections and build a community of support among participants.

INSTRUCTOR: Wendy Burtner, Nonprofit Consultant

FEE: Free, but RSVP is required

Strategies for Getting Out the Vote

Friday, Sept. 11 from 10 – 11:30 a.m.

The three measures of social capital are volunteering, donating and voting. All three parts are challenging in this tumultuous environment, but of the three it is true that voting is crucial at this time. It is most important that every nonprofit worker needs to be a voter engagement professional this year. These community leaders will share practical and time-tested strategies for voter engagement. Join us for a provocative and useful conversation.

PANELISTS: Peggy Morrison Outon, Bayer Center and Covestro Center (moderator); DeWitt Walton, The Pittsburgh A. Philip Randolph Institute; Hannah Locop, Greater Pittsburgh Nonprofit Partnership; Kate Kelly, Housing Alliance of Pennsylvania

FEE: Free, but RSVP is required

Executive Director Boot Camp

Tuesday – Thursday, Sept. 15 – 17 from 10 a.m. – noon

ED Boot Camp is a three-day, entry-level webinar series for new executive directors. We will cover the basics of nonprofit management, including: tools and tips for effective leadership, organizational stability, fundraising, financial management, regulatory compliance, and governance. The webinars 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.

Day 1 – Nonprofit Management

Day 2 – Governance

Day 3 – External Affairs

INSTRUCTOR: Wendy Burtner, Nonprofit Consultant

FEE: \$40 per session OR \$100 for the whole series

Strategies Toward Equity

Friday, Sept. 18 from 10 – 11 a.m.

Join Anthony G. Robins, Chief Diversity and Inclusion Officer at Robert Morris University as he shares his insights about creating a more equitable and diverse university. We'll also have a lively conversation about ways that nonprofits can address bias and create more equity in the communities where your nonprofit has an impact.

INSTRUCTORS: Anthony G. Robins, Robert Morris University; Yvonne VanHaitsma, Covestro Center

FEE: \$30

Five Steps to Growing Your Planned Giving Program in 2020

Wednesday, Sept. 23 from 1 – 2 p.m.

Whether you're brand new to planned giving, or have a thriving program in place, this webinar will provide clear, tactical tips to navigating a year that is both extremely challenging and full of potential. We'll highlight clear strategies that the country's savviest nonprofits are using, share marketing templates you can make your own, and demystify one of the most confusing yet powerful types of philanthropy.

INSTRUCTOR: Patrick Schmitt, FreeWill

FEE: \$30

Does Your Case Statement Make the Grade?

Thursday, Sept. 24 from 10 – 11 a.m.

One of the essential tools for successful fundraising is the "case for support," also known as the case statement or statement of need. This 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 an endowment. Considering its importance, it's surprising how many nonprofits have difficulty putting the reason or reasons for their fundraising project into words. This webinar 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: \$30

Nonprofit Management CLASSES

The Challenges and Opportunities in Fundraising During a Pandemic

Friday, Sept. 25 from 10 – 11:30 a.m.

All nonprofits are experiencing the enormous challenges of delivering programs in new and adaptive ways, but even more challenging for many is securing the financial resources to meet the community need. Join us for a thoughtful dialogue between an innovative and resourceful funder and a nonprofit executive who is protecting her mission while pivoting to meeting community need. Come with questions and your own insights. Let's talk!

PANELISTS: Peggy Morrison Outon, Bayer Center and Covestro Center (moderator); Mary Phan-Gruber, Jefferson Regional Foundation; Angela Garcia, Global Links

FEE: \$35

Tools for Identifying Individual Donors

Wednesday, Sept. 30 from 10 – 11:30 a.m.

Everyone's biggest question in fundraising is, "How do I find individual donors?" While there isn't a secret place to find a list of individual donor prospects, there are ways to identify prospects by mapping your organization's networks. We'll spend the session discussing effective strategies and introducing useful tools your organization can use to identify new individual donors.

INSTRUCTOR: Emma Kieran, Pilot Peak Consulting

FEE: \$35

Performance Management: A Year-Round Pursuit

Thursday, Oct. 1 from 10 – 11:30 a.m.

Employees, supervisors, and managers all seem to hate the performance management process equally. It is often time-consuming for supervisors and doesn't get the expected results. Employees may feel judged or not appreciated. Since feedback and documentation are critical to organizations, how do we make the process work better? Join us for this session on the good, bad, and ugly of performance management as we discuss best practices and some of the key components to better systems. We will also discuss the importance of continuous communication and feedback between employees and their bosses.

INSTRUCTOR: Phyllis Hartman, PGHR Consulting, Inc.

FEE: \$35

Conquering Your Donor Database Dragon

Wednesday, Oct. 7 from 10 – 11:30 a.m.

Having a database with information in it is one thing. Being able to get the reports and information you need back out is another. Learn how to make your database work for you and how to utilize it in your various fundraising efforts. This session is designed to help you clean up your database and create a strategy to leverage the database so you can make more data-driven decisions and spend more time raising money for your mission.

INSTRUCTOR: Dave Tinker, ACHIEVA

FEE: \$35

Board Chair Brainstorm

Mondays, Oct. 12 and Dec. 7 from noon – 1 p.m.

Attention all board chairs: YOU ARE NOT ALONE. Join this elite gathering of board chairs and board presidents for a time of brainstorming and bonding to share stories, challenges and build solutions around the issues involved in being a board chair. We're in this together, even when we're apart!

MODERATOR: Dee Delaney, ESC

FEE: Free, but RSVP is required

How to Build Your Brand in Turbulent Times

Tuesday, Oct. 13 from 10 – 11 a.m.

Wow! What a year 2020 is turning out to be! The Covid-19 pandemic is just one of many crises we are all trying to live and work through. While things are reopening in various scattered stages following this first pandemic wave, no one has a clue how the next wave will impact us and how we should compete to win. Designed for leaders and marketers, this seminar will reveal the six key actions nonprofit organizations must take to improve their brand's chances for success.

INSTRUCTOR: Stephen Wayhart, Brandmill

FEE: \$30

Feedback and Difficult Conversations: In-Person and Virtual

Thursday, October 15 from 10 a.m. – noon

Communicating with others is hard enough in-person. In virtual settings, the challenges multiply. In this workshop we'll address key strategies for good team communications that can be applied both in person and in the virtual environment. We'll use Zoom interactions and break-out rooms for practice activities and discussions. Come prepared to have your camera "on" and actively participate as we learn and practice together.

INSTRUCTOR: Trina Walker, TLW Strategy

FEE: \$40

We Consult!

Have a nonprofit need that classes can't cover? Bayer Center 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 2,200 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.

We customize strategic planning contracts to match many different timelines and levels of complexity. Contact us at **412-397-6000** or **bcnm@rmu.edu** for more information.

Nonprofit Management CLASSES

Putting LinkedIn to Work for Your Organization

Tuesday, Oct. 20 from 10 – 11 a.m.

Get the best strategies for your LinkedIn presence and put LinkedIn to work for your organization. HR professionals and nonprofits consider this ever-growing online platform essential for recruitment and awareness-raising. LinkedIn is also a dynamic platform in which to showcase your organization, experts, and more. Explore ways to support fundraising and marketing for your nonprofit or business. This session provides knowledge for how to create a stellar organizational profile and maximize visibility for your leaders, causes, and stars.

INSTRUCTORS: Lynette Asson, New Place Collaborations and Yvonne Hudson, Quantum Theatre

FEE: \$30

Going Virtual with Your Fundraising Event

Wednesday, Oct. 21 from 10 – 11:30 a.m.

Join us for an advantageous conversation with three community leaders who have recently hosted virtual fundraising events: Inclusive Voices and Hotline Ring. One (Inclusive Voices) a time-honored community event based in rich conversation. The other (Hotline Ring) a collaborative event between organizations with aligned missions showcasing a dynamic representation of regional artists, projects, and programs. Though very different in their execution, both required the ability to be creative and adaptive in their planning, and our panelists will be ready to talk about how they managed to make each of their virtual fundraising events a success.

PANELISTS: Vikki Garner, PACE; Joseph Hall, Kelly Strayhorn Theatre; Erin Perry, Legacy Arts Project; Joyce Lewis-Andrews (moderator), Vincentian Charitable Foundation

FEE: \$35 each OR \$50 for both “Going Virtual” sessions

Going Virtual with Your Volunteer Engagement

Wednesday, Oct. 21 from 1 – 2 p.m.

If you are struggling to find creative ways to keep your volunteer base engaged in your mission while they can't be there in person, this session is for you. Join us as we explore and discuss strategies for staying connected to your base supporters and also engaging new supporters in meaningful ways from afar.

INSTRUCTOR: Stacy Bodow, Global Links

FEE: \$30 each OR \$50 for both “Going Virtual” sessions

Leadership Skills for New Supervisors

Thursday, Oct. 22 from 10 a.m. – noon

The purpose of this webinar is to provide an overview of the various roles and functions of a supervisor. Designed for new leaders, we will address some of the key areas of a supervisor's responsibility, including leading and managing, supporting and motivating, and teaching and developing others. We will also cover the fundamentals of goal setting and planning. Topics include:

1. Overview of key areas of a supervisor's responsibility
2. Transitioning to Leadership: Issues and Challenges
3. Avoiding Common Mistakes and Pitfalls
4. Managing Your Time: Goal Setting, Planning and Prioritizing
5. Best Bosses: What Type of Leader Do You Want To Be?
6. Managing Performance: Supervising and Developing Others
7. Role Modeling: Identifying Key Professional Behaviors

INSTRUCTOR: Tom Sullivan, Professional Growth Associates

FEE: \$40

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**.

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 us at **412-397-6000** or **bcnm@rmu.edu**.

Nonprofit Management CLASSES

Human Resource Guidance for Nonprofits in the Age of COVID-19

Wednesday, Oct. 28 from 10 – 11:30 a.m.

Hang on...it is going to be a bumpy ride!!! This webinar will focus on issues with returning employees to the workforce, leave issues due to childcare or quarantine, your obligations under the Families First Coronavirus Response Act, and wage and hour concerns when you have employees work from home. If that isn't enough, we will discuss sending sick employees home, dealing with employees who don't want to come to work, and learning what OSHA has to say about all of this. And if that isn't enough, we will throw in some general expectations for cleanliness in the workplace. Can we do all of this in one 90 minute webinar? YES. Please bring questions. Webinars are much more fun with interaction.

INSTRUCTOR: Jim Southworth, Dickie, McCamey & Chilcote, P.C.

FEE: \$35

Principles for Emergency Planning

Thursday, Oct. 29 from 1 – 2:30 p.m.

This webinar covers the consideration and steps needed plan for disasters and emergencies for businesses and nonprofits. Having a plan reduces the impact on employees, property, and operations and allows for business continuity and faster recovery. We will discuss why preparation and planning is essential, creating a plan, identifying mission priorities, employee accountability and safety, incident management tools, creating a communications strategy, emergency preparedness training, and recovery.

INSTRUCTOR: Frank X. Hartle, Robert Morris University

FEE: \$35

Strategic Scenario Planning

Friday, Nov. 6 from 10 – 11:30 a.m.

A key quality of leadership is the ability to anticipate. Boy, is that true now! A tool that many leaders have employed is scenario planning, which demands that the participants think all the way around the situation or problem they are facing. This kind of thinking is a protection from unpleasant surprise. Join us as we talk to two outstanding community leaders about how they are anticipating the future, creating a variety of scenarios to address it, and flexing when nothing goes the way they thought it would.

PANELISTS: Peggy Morrison Outon, Bayer Center and Covestro Center (moderator); Trisha Gadson, Macedonia FACE; Josh Whiteside, The Education Partnership

FEE: \$35

Program Design Primer: Creating Fundable, Evaluation-Ready Programs

Tuesday, Nov. 10 from 10 – 11:30 a.m.

New programs and services are often reactive: the community has a need, or a funder has resources to address a specific challenge. But to be successful, you need a good process, the right people at the table, and a plan for evaluation. This webinar is a primer on designing new programs and revising existing programs to meet community needs. You will learn who to involve in designing and revising programs, how to assess demand and community need, what to do if an existing program is falling short of its goals, and how to build in data and evaluation from the beginning.

INSTRUCTOR: Jon Hoffman, Hoffman Consulting

FEE: \$35

Applied Research at the Bayer Center

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.

As we prepare to gather data for the 2021 edition, the cost of the 2019 survey will be reduced to \$100 for nonprofits with budgets under \$2 million, and \$150 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.

Additionally, we will need your help to gather the new data this coming October. Once again, the survey report will be distributed to participants at no charge. Contact Carrie Tancaitor at **412-397-6003** or tancaitor@rmu.edu to find out how to participate.



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 this 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.

Nonprofit Management CLASSES

BoardsWork! Board Member Virtual Training

Thursday, Nov. 12 and Nov. 19 from 8:30 – 11:30 a.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 these webinars, we'll cover the full gamut of nonprofit governance including boardmanship, fundraising, financial oversight, planning and technology.

INSTRUCTORS: Peggy Morrison Outon, Bayer Center and Covestro Centers and special guests

FEE: \$500 (\$400 without matching)

Safety and Health Awareness for Nonprofits

Friday, Nov. 13 from 10 – 11:30 a.m.

Many nonprofits may have had safety and health injuries and illnesses occur, or losses to their facilities caused by safety deficiencies, but have not been able to adequately address and manage the risks proactively. This webinar is intended to provide basic core information to nonprofit leaders and managers on how to recognize occupational safety and health risks, reduce or eliminate them, and ways to limit their potential to come back. It will introduce simple, easy to use safety survey/checklists to identify potential occupational safety and health problem areas. Attendees will be introduced to volunteer occupational safety and health professionals to help in reviewing and prioritizing results of self-administered surveys, conducting safety survey assessments and/or to help with risk reduction recommendations where needed.

INSTRUCTORS: Raffie Sessa, Fran Sehn, Tom Blank, and Frank Pokrywka, The American Industrial Hygiene Association, and the American Society of Safety Professionals

FEE: \$35

Developing Coaching Skills as a Manager

Tuesday, Nov. 17 from 10 – 11 a.m.

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. Joel will give you key actions to use when coaching for optimal employee performance.

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

FEE: \$30

Understanding Corporate Social Responsibility and Partnering with Companies

Thursday, Nov. 19 from 1 – 2:30 p.m.

Most companies have a corporate social responsibility strategy. That includes partnering with nonprofits in their local community. By understanding a company's perspective more closely, it will help facilitate building partnerships. This webinar, led by practitioners in the field, will help explain the larger picture of CSR and the importance of the relationships at the local level.

INSTRUCTORS: Stacey Brodak and Lee Ann Wainwright, Waynesburg University and Yvonne VanHaitsma, Covestro Center

FEE: \$35

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 material, 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.

Technology

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.

Creating Effective Social Media Content

Wednesday, Sept. 23 from 10 – 11:30 a.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 webinar 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: \$35

Using Google Drive and Docs in the Workplace

Tuesday, Oct. 6 from 1 – 3 p.m.

Google Drive is a free, collaborative tool that lets you keep all your work in one place, view different file formats without buying extra software, and access your files from any device. We'll take a dive into both Google Drive, as well as Google Docs, Google Drive's equivalent of Microsoft Word.

INSTRUCTOR: Garrett Cooper, BenefitMany

FEE: \$40 or \$60 for both "Google" sessions

Conquering Your Donor Database Dragon

Wednesday, Oct. 7 from 10 – 11:30 a.m.

Having a database with information in it is one thing. Being able to get the reports and information you need back out is another. Learn how to make your database work for you and how to utilize it in your various fundraising efforts. This session is designed to help you clean up your database and create a strategy to leverage the database so you can make more data-driven decisions and spend more time raising money for your mission.

INSTRUCTOR: Dave Tinker, ACHIEVA

FEE: \$35

Using Google Sheets and Slides in the Workplace

Tuesday, Oct. 13 from 1 – 3 p.m.

This productivity webinar features an overview of Google Sheets and Google Slides, the equivalent of Microsoft Office's Excel and PowerPoint applications. Learn how to use these online versions of these two useful tools in a format that allows users to seamlessly collaborate on projects as a team.

INSTRUCTOR: Garrett Cooper, BenefitMany

FEE: \$40 or \$60 for both "Google" sessions

Excel Day

Introduction to Excel: Hands-On

Wednesday, Oct. 14 from 9 a.m. – noon

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

Intermediate Excel: Hands-On

Wednesday, Oct. 14 from 1 – 4 p.m.

Learn more in-person 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 each or \$115 for both classes.

LOCATION: The Bayer Center for Nonprofit Management, Robert Morris University, Benjamin Rush Center, 6001 University Blvd, Moon Township, PA 15108

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Technology Planning for Nonprofits in a Chaotic World

Wednesday and Thursday, Nov. 11 – 12 from 1 – 2:30 p.m.

The operating environment for nonprofits has become precarious and more reliant on technology than ever before. Devoting time and energy to proactive technology planning can help reduce some of the stress by giving you a handle on where your technology currently is and where you need it to be. In this webinar, learn the essential elements and process for technology planning, with plenty of handouts and resources to help you along the way.

INSTRUCTOR: Cindy Leonard, Cindy Leonard Consulting

FEE: \$70

Advanced Excel: Hands-on

Wednesday, Nov. 18 from 9 a.m. – 4 p.m.

The deeper you go into Excel, the more directions you can pursue. In this full-day, in-person class, we'll have plenty of time to go beyond the typical functions and into more magic, timesaving 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

LOCATION: The Bayer Center for Nonprofit Management, Robert Morris University, Benjamin Rush Center, 6001 University Blvd, Moon Township, PA 15108



BAYER CENTER FOR NONPROFIT MANAGEMENT

RMU.EDU/BCNM

Staff

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*. Peggy has been also recognized locally by several organizations, including the Girl Scouts, Pittsburgh City Council, and was named by the *Pittsburgh Business Times* as a *2020 Woman of Influence*.

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.

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.

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.



COVESTRO CENTER FOR COMMUNITY ENGAGEMENT

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, and maintains a public and professional writing certificate.

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.

Instructor Bios

Lynette Asson, principal of New Place Collaborations, is an events and marketing maven who creates innovation solutions 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 has enjoyed working with Pittsburgh-area nonprofits and corporations including Crisis Center North, Animal Protectors of Allegheny Valley, Pittsburgh Festival Opera, and varied projects for BCNM and its clients.

Thomas L. Blank has over 45 years of leadership, mentoring, and professional recognition in safety and health research, education, toxicology, safety, industrial hygiene, regulatory processes, management of environmental, health, and safety (EHS) programs, EHS compliance, and process safety/risk management. He graduated from the University of Utah with a bachelor's in Biology with a minor in Chemistry and Microbiology and from the University of Central Missouri with master's in Industrial Hygiene. Since 2007, Thomas has been an Adjunct Professor for the Pennsylvania State University in New Kensington, where he has taught the Health and Safety related courses for the Environmental Engineering Review Course.

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 month-long 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.

Stacey Brodak, Vice President for Institutional Advancement and University Relations, joined Waynesburg University in 2017 and helped launch the Chevron Center for Corporate Social Responsibility in 2018. Experienced in government and corporate affairs, she has a broad background in communications, donor stewardship, government and community relations, corporate social responsibility, leadership and management for both the private and public sectors. Active in the community, she currently serves on the boards of Blueprints, Leadership Washington County and is a member of the Waynesburg Rotary Club. Stacey received her MBA from Waynesburg University, a Certificate in Corporate Citizenship Management from Boston College and a Bachelors of Arts from West Virginia University.

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 Entertainment, 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

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.

Dee Delaney served as the first Executive Director of FISA Foundation from 1996 until her retirement in 2010. During her tenure with FISA, grants totaling over \$17 million were distributed in support of women, girls, and people with disabilities. She is a graduate of Saint Mary's College, Notre Dame, Indiana and Leadership Pittsburgh. She has been the recipient of numerous awards for her advocacy work, including the United Cerebral Palsy Lifetime Achievement Award, University of Pittsburgh School of Dental Medicine Appreciation Award, and Achieva Excellence in Professional Service Award and was named a Distinguished Daughter of Pennsylvania by Governor Rendell in 2010.

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.

Trisha Gadson, Executive Director of Macedonia FACE began a career in Child Welfare as a Child Protective Service Worker, followed by both intake and supervisory positions at Allegheny County Children and Youth Services. She implemented a medical foster care case management program at Mercy Hospital and served as the Training and Best Practice Technical Assistant for the Pennsylvania Statewide Adoption and Permanency Network. Trish serves as a trainer and curriculum writer for the Child Welfare Training Program of the University of Pittsburgh and is a member of the board of directors for the McKeesport Area School District. She holds a Ph.D. in community engagement.

Angela Garcia is the Executive Director of Global Links, a Pittsburgh-based nonprofit organization that supports public health initiatives in communities that lack resources, locally and globally, particularly in Latin America and the Caribbean. She serves on the Advisory Board of the Bayer Center for Nonprofit Management and is a founding member of the Pittsburgh Chapter of the Labor Council for Latin American Advancement. She was named a Pittsburgh's "40 under 40", a Cribs for Kids Woman of Achievement and was nominated for an Athena Award. She lives with her husband and children in Emsworth and enjoys all things Pittsburgh, especially biking and kayaking our trails and rivers.

Victoria "Vikki" Garner coordinates public relations, marketing and media activities for Program to Aid Citizen Enterprise (PACE) and cultivates and prepares proposals for potential funders. Her professional experience includes several years as a publicist and community and public affairs producer for Time Warner Cable in New York City, and as a communications specialist in the areas of community affairs and health education and promotion in Pittsburgh. A native of Pittsburgh and a graduate of Schenley High School, Vikki earned her Bachelor of Arts degree in English from Spelman College and a Paralegal Certificate from the Duquesne University Paralegal Institute.

Instructor Bios

Joseph Hall is the Executive Director of the Kelly Strayhorn Theater, a presenting arts organization that serves as a catalyst for creative expression, bringing diverse communities together through multidisciplinary performance work in Pittsburgh’s East End. He has worked as an independent producer, curator, and performer, co-founding Pearl Diving Movement Residency, a month-long dance residency, and co-curating TQ Live! at the Andy Warhol Museum. As a performer, Joseph has collaborated with Staycee Pearl dance project (Pgh), choreographers Lida Winfield (VT), Maree Remalia (FL), and Jasmine Hearn (NYC), video artist Suzie Silver (Pgh), and presented his own work at The Andy Warhol Museum as part of *TQ Live!*, which he also MCed.

Frank X. Hartle is an Assistant Professor at RMU in the School of Informatics, Humanities and Social Science and Director for Criminal Justice Programs. With 30 years of experience in law enforcement and criminal justice including the Pittsburgh Bureau of Police as an officer and detective, he serves as the Assistant Federal Security Director for Law Enforcement for DHS/TSA. Frank was the Federal Air Marshal Service representative on the Pittsburgh FBI Joint Terrorism Task Force. He holds a degree in Computer Systems Technology from Duquesne University, a master’s degree in Criminal Justice Administration from Point Park University, and a doctor of science in Information Systems at Robert Morris University.

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 M.S. 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.

Jared Henigin, AIF® joined Wealth Management Partners in November of 2018. Prior to joining WMP, Jared was a financial advisor at Northwestern Mutual. Jared is a registered representative and Investment Advisor Representative with Commonwealth Financial Services® (Member FINRA/SIPC). In addition, Jared holds the Accredited Investment Fiduciary (AIF®) designation and maintains the Series 6, 7, 63, and 65 securities registrations. He works with WMP in a dual role as Director of Investment Services and as a Wealth Manager. Like Michael, he also works with nonprofit organizations providing fiduciary consulting as well as asset management. Jared lives in Greentree with his wife, Cady. He is a board member for the local chapter of the Crohn’s and Colitis Foundation and enjoys playing sports and guitar in his spare time.

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Jon Hoffmann is the principal of Hoffmann Consulting, serving both nonprofit and for-profit clients with a focus on strategic planning, program design and evaluation, and operations management. Prior to launching his own consulting business, his career has spanned executive leadership roles in social services, communications strategy for an advocacy organization, and housing development with a focus on affordability. A Pittsburgh native, Jon holds a master’s degree in social work and bachelor of science in psychology from the University of Pittsburgh.

Yvonne Hudson is a versatile marketing/PR expert and writer who has created 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 has included projects for the BCNM and its clients, Pittsburgh Festival Opera, and Crisis Center North. A journalism and psychology alumna of Point Park University, Yvonne earned an M.A. in arts management and developed her solo show Mrs Shakespeare at Pitt. A principal of New Place Collaborations, she is a board member of Pittsburgh Shakespeare in the Parks. Yvonne now serves as development manager for Quantum Theatre.

Kate Kelly joined the Housing Alliance of Pennsylvania as an Associate Director of Outreach & Engagement in January 2020 where she manages the Housing Alliance’s PA Votes civic engagement initiative which has the goal of establishing 4,000 new voter contacts leading up to the November 2020 election. Previously, she worked for Monarch Housing Associate in New Jersey as a Public Policy Associate and as the Reaching Home Campaign Manager for the Partnership for Strong Communities in Connecticut. Kate holds an MSW from the UCONN School of Social Work and earned her Bachelor of Arts at the University of Notre Dame.

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.

Cindy Leonard has devoted over 20 years working in and with nonprofit organizations, and has served on numerous boards and committees, in various volunteer capacities, and as a consultant, a trainer, an executive director, a program manager, and an IT director. Cindy holds a Bachelor of Science in Computer Science, a Master of Business Administration, and a Master of Education in Instructional Design, all from Seton Hill University. Learn more at <https://www.cindyleonardconsulting.com>.

Joyce Lewis-Andrews has been a volunteer with the Executive Service Corps since 2009 and is skilled in the areas of fundraising, marketing and communication, strategic planning, board development, volunteer management, and community engagement. She is currently the Executive Director of the Vincentian Charitable Foundation, and has served in a leadership position with McGuire Memorial Foundation, Girl Scouts Western Pennsylvania, Community Design Center of Pittsburgh, and Adult Resources, Inc. She is a facilitator for the *BoardsWork!* program at the Bayer Center. A graduate of Point Park University, Lewis-Andrews lives with her husband, David, in Ben Avon Heights.

Hannah Locop is the Program Manager of the Greater Pittsburgh Nonprofit Partnership (GPNP), a program of The Forbes Funds and coalition of more than 400 nonprofits across 10 counties in southwestern Pennsylvania. Hannah serves to support the advocacy, education, and convening of the network, including civic engagement programming regarding the 2020 Census and voter registration. Born and raised in South Florida, Hannah is first-generation Filipina American and a graduate of the University of Florida with a BS in Political Science.

Instructor Bios

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.

Erin Perry has been the executive director of the Legacy Arts Project since 2011. As a graduate of the Katz Graduate School of Business, she applies her academic training within a community setting, utilizing arts as a tool for transformation. Erin has been an active member of Legacy since 2005, participating as a member of the dance ensemble through present day. With an extensive background in teaching, she has impacted children and adults from Wilksburg to Taiwan, teaching classes in English, Math, Photography, and Movement. As a mother of two growing boys, her focus continues to be grounded in the upliftment of humanity through knowledge of self.

Mary Phan-Gruber, MSW, began her role as the first Executive Director of the Jefferson Regional Foundation, targeting communities south of Pittsburgh, PA, in November 2013. Prior to this role, she served as a Deputy Administrator at the Area Agency on Aging, overseeing quality, monitoring, training and information systems. Mary is a summa cum laude graduate of Muskingum College, and received her Master of Social Work in Policy, Planning & Administration at Western Michigan University. Currently she is the President of PA Coalition Against Rape, and serves on the Executive Council for the University of Pittsburgh School of Social Work and the Social Work Advisory Board for CCAC.

Frank Pokrywka, Ed.D., CIH, FAIHA retired as the Industrial Hygiene Manager for the University of Pittsburgh EH&S Department in 2018 where he was responsible for asbestos abatement, indoor air quality, water quality and laboratory safety. He is currently a consultant for KTA Tator and AM Health and Safety. Prior to joining Pitt in 1996, he spent 12 years as an IH consultant for SE Technologies, 5 years with US Steel, 2 with Koppers Research and 3 years with the air pollution division of Wheelabrator-Frye. During his 47 year career in academia, consulting, industry and construction he has amassed an extensive knowledge of safety, health and environmental matters.

Anthony G. Robins, Ph.D., is the Chief Diversity and Inclusion Officer and Associate Professor of Biology at Robert Morris University. He holds a B.S degree in Biology/Psychology, a Ph.D. in Epidemiology and a certification in Diversity and Inclusion from Cornell University. He is a member of the American College of Epidemiology, Pennsylvania Public Health Association, American Public Health Association, Black Caucus of Public Health Workers, and the Academy of Health Equity. Anthony has been the recipient of numerous past awards and honors, including Inspiring Leaders in STEM; Distinguished Teaching Award; Who's Who in Black Pittsburgh Men of Excellence; and the New Pittsburgh Courier's 50 Men of Excellence.

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 In Charge with the Federal Deposit Insurance Corporation (FDIC) for 11 years before joining Bookminders in 2001.

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.

Patrick Schmitt is a leading innovator in the field of fundraising and social impact. From 2009-2010, Patrick ran email fundraising for President Obama, where his team invented many existing best practices in digital fundraising. He served as Head of Innovation at Change.org, helping to grow that organization to 200 million members in just four years. Patrick is the co-founder of FreeWill, a social venture which has helped organizations raise more than \$1.5B in new planned gifts and qualified charitable distributions. Patrick and his co-founder Jenny were recently named two of the Top 50 Philanthropists in the World by Town & Country. Patrick received his BS from Georgetown University and MBA from Stanford University.

Fran Sehn is Principal Consultant for FxS Risk and Safety Consulting. He worked as a loss control consultant for 18 years with several major insurance carriers. He was Vice President – Risk Control for Willis Towers Watson where he provided consulting services for manufacturing, construction, institutional, service and supply chain accounts throughout North America. He has been a project leader for both WTW Blue Safety Management clients and the foundry practice Prior to joining Willis he was Manager of Safety for Washington Steel. He is a member of several ASSP/ISO/ANSI standards committees. He was awarded the 2019 ASSP's COPS SPY.

Raffie Sessa is a Certified Industrial Hygienist and Safety professional, and Fellow of the American Industrial Hygiene Association. He has 40 years of experience in industrial safety and health. 23 years of his career was spent with Bayer, with the last 10 years as the Corporate Manager of Safety and Health for Bayer's North American operations. He retired in 2011 and started a part-time safety and health consulting business, which he is still operating. He has a B.S. in Biochemistry from the University of Pittsburgh, and an M.S. in Industrial Hygiene and Environmental Science from Drexel University in Philadelphia, PA, in 1980.

James Southworth is a principal of Dickie, McCamey & Chilcote, P.C. He concentrates his practice in the areas of employment and labor law and employment immigration, as well as alternate dispute resolution and mediation. Prior to becoming an attorney, he was a human resource manager, giving him an understanding of the issues companies face when dealing with employees, which enables him to provide advice that not only passes legal muster but is also grounded in the realities of the workplace. James has complied with and been accepted as a mediator for the Western District of Pennsylvania ADR program.

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 America and in Europe. Tom has a master's degree in Public Administration from Long Island University, NY and a bachelor's in Social Work from Kean University, NJ.

Instructor Bios

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.

Lee Ann Wainwright is the Director for Strategic Partnerships and the Center for Corporate Social Responsibility at Waynesburg University. Previously, Lee Ann was a Corporate Affairs Advisor for Chevron where she managed the company’s STEM Education & Workforce Development investments as well as their CSR work across PA, OH and WV. She was recognized for her work by the Pittsburgh Business Times with a Women in Natural Gas Leadership (WING) award and as a member of the 2018 *40 under 40* class. Lee Ann received her undergraduate degree in advertising and public relations from Marietta College and her master’s degree in public relations from Kent State University.

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 Avenue 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 he serves on the Public Works and Public Safety committees and is Chairman of the Executive committee and the Committee on Economic Development and Housing.

Michael J. Ward, LUTCF, ChFC®, AIFA® is founder and president of Wealth Management Partners, LLC, a Pittsburgh based wealth management firm. Prior to establishing WMP in 2001, Michael was the associate managing director of the Acacia Financial Center of Pittsburgh. During his 16 years with Acacia, Michael held a variety of management positions. Michael is a registered representative, Investment Advisor Representative and securities principal with Commonwealth Financial Services® (Member FINRA/SIPC). In addition, Michael is a Chartered Financial Consultant®, holds the Accredited Investment Fiduciary Analyst® (AIFA®) designation, and maintains FINRA Series 7, 24, 63, and 65 securities registrations. He works with nonprofit organizations providing fiduciary consulting as well as asset management. Michael lives in Beaver, PA with his wife and two children. He is a member of the Saints Peter and Paul Church finance council and the Brighton Township zoning board. His hobbies include skiing, boating and family time.

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Stephen Wayhart has been a brand builder and growth marketer for 30+ years, from his Ad Agency days with General Motors’ Dealer Groups to the corporate side with McDonald’s and Sprint PCS. For the past 17 years, as principal of BrandMill, he has elevated brands such as The Gateway Clipper Fleet, Iron City Beer, Kennywood, Idlewild and the Priory Hospitality Group. As a servant leader, he has helped to lead and lift the brands of nearly 50 nonprofit organizations. In short, Stephen builds strong, purpose-driven brands that make a profitable and positive impact.

Josh Whiteside started his career in the insurance industry as a corporate benefits consultant in the Pittsburgh area. In 2012, he helped to launch Beverly’s Birthdays, with the mission of providing birthday parties and presents for children experiencing homelessness in the Pittsburgh region. After 18 months serving as volunteer Director of Fundraising and board member, Josh switched and became the first full-time employee of Beverly’s Birthdays as a Director. In 2018, Josh made the change from birthday programming to education, as Executive Director of The Education Partnership, providing school supplies for students and teachers in low-income schools in the Pittsburgh region.

Drew Zerick is an assurance services manager with Sisterson & Co. LLP and has over 15 years of professional experience. Her professional career has involved providing accounting and auditing services to a variety of clients, with a focus on nonprofit organizations, as well as spending several years working as a Controller for a healthcare company. Drew rejoined Sisterson in 2013 where she also serves on the Firm’s Recruiting Committee and as an instructor for our in-house continuing professional education program. Drew also has experience serving on a nonprofit board and presenting financial statements to nonprofit boards.

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