

Spring 2018 Courses



Without leaps of  
*imagination*, or dreaming,  
we lose the *excitement*  
of *possibilities*.  
*Dreaming*, after all,  
is a form of *planning*.

*Gloria Steinem*



BAYER CENTER FOR  
NONPROFIT MANAGEMENT

BCNM-RMU.ORG











**BAYER CENTER FOR  
NONPROFIT MANAGEMENT**

**BCNM-RMU.ORG**

*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 18 years of service to the nonprofit community, the Bayer Center has completed over 2,000 consulting engagements and educated over 9,100 students. Our consulting clients include human services, arts, faith-based, community development, environmental and education 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
- Prudent software choices and website design
- 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.*

**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.

# New & Exciting at the Bayer Center

## Strategies for Resilience

Friday, May 11 from 9 a.m. – 2 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 health and resilience. We will begin by focusing on ourselves, then move outward and look at ideas and relationships... an essential nexus for 21st Century leaders. One-hour topics will be intertwined with food and networking, and will include:

### Mindfulness

“Mindfulness” is a particular kind of self-awareness that creates the possibility for change and healing. When mindfulness is practiced in the workplace, organizations become more resilient, sustainable, and effective. Learn how to bring mindfulness to your work and how to connect more authentically with yourself, your colleagues, and your mission.

### Breaking the Box

Are you feeling stuck in some ruts, but aren't sure how to spark innovative ideas? We'll experiment with some exercises to bust open minds and possibilities and consider how to integrate them into the workplace.

### Collaborating For Change

You are working on important issues in the social and civic sector...but change is not happening at the scale and impact you desire. Now, imagine new ways of tackling some of our most pressing challenges through cross-sector collaboration. This workshop will have you consider your organization's role in sparking collaboration – with partners both obvious and not so obvious. Come prepared to think big and stretch your imagination of what is possible.

**Location:** Alloy 26, 100 South Commons, Suite 102, Pittsburgh, PA 15212

**Instructors:** Seth Hufford and Mary Parker, The People Group; Susan Loucks, Bayer Center and Katie Outon, Attorney at Law

**Fee:** \$25 and includes lunch

## Executive Director Huddle

Thursday, Jan. 11, Thursday, Feb. 8; Thursday, March 8, Thursday, April 12, Thursday, May 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 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.

**Instructor:** Wendy Burtner-Owens, Steeltown Entertainment Project

**Fee:** Free, but R.S.V.P. is required. Please bring your lunch.

HALF PRICE FOR 2018!

## The 2017 Wage and Benefit Survey

The Wage and Benefit Survey of Southwestern Pennsylvania Nonprofit Organizations has been a trusted resource since 2000. It has provided the most current data about regional salary and benefits needed both for valid decision-making by nonprofit executives and for 990 compliance. We have a comprehensive record of the progress made by our nonprofit employees in salary and benefits over the last fourteen years.

Your willingness to provide information has made this sector-wide resource possible. Additionally, it sparked the 74% pay equity conversation resulting in greater equity for women and men in the regional nonprofit sector. The newest 2017 version is available for purchase on our course registration page: [rmu.edu/bcnmregistration](http://rmu.edu/bcnmregistration). There is no cost for nonprofits who participated in the survey, and nonprofits who did not participate have traditionally paid \$200 for the results.

As we prepare to gather data for the 2019 edition, the cost of the 2017 survey will be reduced to \$100. Additionally, we will need your help to gather the new data this coming September. Once again, the survey report will be distributed to participants at no charge. Contact Carrie Tancraitor at 412-397-6003 or [tancraitor@rmu.edu](mailto:tancraitor@rmu.edu) to find out how to participate.

# Finance

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**.

## Sound and Strategic Nonprofit Investment: Risks and Rewards

*Wednesday, March 7 from 1 – 4 p.m.*

Many of our region's nonprofits oversee the investment of precious community assets. Boards and executives may be thinking about their readiness to successfully balance risk and reward or prudently act as effective financial stewards and fiduciaries. This class will provide you guidance for identifying the fiduciary and governance practices to help nonprofits understand the concepts and merits of:

- Developing prudent governance systems and investment policy statements
- Understanding portfolio risk and reward characteristics and peer practices
- Spending policies and asset allocations
- Fiduciary considerations for finance/investment committees
- Managing ethical considerations in investing

**Instructors:** Joseph R. Lantz, Federated Investors and Evie Gardner, Bayer Center

**Fee:** \$65 (\$55 if paid online)

## The Board's Role in Financial Oversight

*Wednesday, March 14 from 4 – 6 p.m.*

Join us as we review the primary ways that board members can fulfill their key fiduciary responsibilities, including avoiding mission drift, participating in the budgeting and auditing processes, reviewing regular financial reports, and understanding the organization's overall financial outlook. We'll answer your questions about serving as a fiduciary and discuss practical strategies for improving your board's ability to fulfill this critical role.

**Instructor:** Evie Gardner, Bayer Center

**Fee:** \$40 (\$30 if paid online **OR** \$100 for the whole four-part series featured on page 10)

## Painting a Picture Through Numbers

*Tuesday, April 10 from 1 – 4 p.m.*

April has a bad reputation, just like financial statements. So we have combined these two misunderstood notions into one fun afternoon. Join us as we learn to love our audits by understanding the richness of the information they provide. We'll look for financial clues along the path to long-term sustainability by getting back to basics. We'll show you how your financial statements simply reflect your activities using numbers instead of words, and use the basic tenets of financial analysis to show you how your organization can proactively seize opportunity while limiting risk. You'll leave armed with new tools, and we'll keep the hot beverages flowing while we're at it.

**Instructors:** Lisa Kuzma, Richard King Mellon Foundation and Evie Gardner, Bayer Center

**Fee:** \$65 (\$55 if paid online)

## Your Pathway to Retirement

*Thursday, April 12 from 9 – 11:30 a.m.*

Financial sustainability isn't just for nonprofits... it's also for you! Hear from financial advisors from the Farrell Group at Pittsburgh-based Hefren-Tillotson as they describe pathways to your retirement and raise your awareness of financial detours that could derail your future. With advice tailored to a variety of age groups, this presentation is designed to help the "newly hired" to "just retired" and everybody in between.

**Instructors:** Greg Farrell and Randee Baer, Hefren-Tillotson

**Fee:** FREE, but R.S.V.P. is required

## Getting Started: Financial Policies and Procedures Manual

*Wednesday, April 25 from 1 – 4 p.m.*

The financial policy and procedures manual is the foundation of a strong financial management system. It is the guide for determining how your organization uses and manages money and establishes internal controls. It also ensures compliance with regulatory standards, donor restrictions, and grantor guidelines. It is important for clarifying roles and responsibilities and ultimately for ensuring that the organization's financial data is an accurate and reliable basis for organizational decision making. During this interactive session, you will learn the major components of the financial policy and procedures manual and how to set policies and procedures that match your organization's needs, as there is no one-size fits all manual.

**Instructor:** Denise Henning, Stewardship Matters

**Fee:** \$65 (\$55 if paid online)

## Prepping for an Audit Clinic

*60-minute sessions available by appointment*

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.

**Instructor:** ESC Volunteer

**Fee:** \$50 per hour *(due to the complexity of this topic, a 2-hour minimum is required.)*



# 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**.

## Executive Director Huddle

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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.

**Instructor:** Wendy Burtner-Owens, Steeltown Entertainment Project

**Fee:** Free, but R.S.V.P. is required. Please bring your lunch.

## BoardsWork! Board Member Training

Wednesday, Jan. 24 from 8:30 a.m. – 4:30 p.m.

OR

Tuesday, April 24 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 Morrison Outon, Evie Gardner and Carrie Richards, Bayer Center

**Fee:** \$425 and includes lunch (\$325 for those not requiring matching services)

## Executive Director Boot Camp

Wednesday, Jan. 31 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.

**Instructor:** Wendy Burtner-Owens, Steeltown Entertainment Project

**Fee:** \$125 (\$115 if paid online)

## Conflict Toolbox!

Thursday, Feb. 1 from 9 a.m. – 4 p.m.

It's inevitable that your staff, your consumers and your board (maybe even you!) will get irritated from time to time. It may feel easiest just to move on. However, it's possible not only to understand and manage conflict, but to get to the root of it, resulting in fewer and less severe problems and an atmosphere of improved trust and openness. This class will focus on understanding dynamics of conflict and building a kit of specific skills. Wherever you experience conflict, this can help! This class will not only illustrate new ways to engage that conflict productively, it will provide lots of hands-on practice in a safe and experimental laboratory setting. Bring your toughest questions, and we'll see what gets the wheels turning once again.

**Instructor:** Susan Loucks, Bayer Center

**Fee:** \$125 (\$115 if paid online)

## Time Management: Techniques, Tips and Tricks

Monday, Feb. 5 from 1 – 4 p.m.

Are your workload and your life load out of control? Do you procrastinate on tasks because you don't know where to start? Here's the good news: personal organization is a skill that can be learned and improved. You'll leave this class with strategies that will help you get organized, reduce stress, increase your productivity and effectiveness, and start enjoying your work and life more!

**Instructor:** Lisa-Ann Smith, ESC Volunteer

**Fee:** \$65 (\$55 if paid online)

## Writing Effective Job Descriptions

Tuesday, Feb. 6 from 9 a.m. – noon

A job description should be practical, clear and accurate to effectively define your needs. In this session, you'll learn how to conduct a basic job analysis in order to develop a job description reflecting the needs of a position. We'll explore how to determine essential functions of a position, and design job descriptions based on identified knowledge, skills, and abilities, in preparation of approval by appropriate human resources or legal department.

**Instructor:** Sandra Marsh-McClain, PA Women Work

**Fee:** \$65 per class (\$55 if paid online)





# Nonprofit Management

## Get the Agility Edge: Five Methods for Developing HR Competencies

Thursday, Feb. 8 from 1 – 4 p.m.

Agility involves more than just knowing about HR; it includes the ability to effectively adapt knowledge to respond to constant change. Competencies are the key to this agility. HR managers are often aware of the competencies they need for a great HR function but not sure how to best use available (and often limited) resources to grow their reports and themselves. We'll provide strategies, tools and tips for building the competencies to help current and future HR leaders create an agile HR function.

**Instructor:** Phyllis Hartman, ESC Volunteer

**Fee:** \$65 (\$55 if paid online)

## Measuring the Impact of Your Volunteers

Tuesday, Feb. 13 from 1 – 4 p.m.

Today's volunteers and funders want to support agencies that use resources efficiently, including volunteer resources. While volunteer numbers are still important, the focus has shifted to the impact those hours have for the clients you serve. This workshop will explore ways to track and report outcomes, and how that information can be used to further engage volunteers and share your story.

**Instructors:** Amanda Trocki and Riley Baker, Pittsburgh Cares

**Fee:** \$65 (\$55 if paid online)

## Ask! The Essential Fundraising Skill

Wednesday, Feb. 14 from 9 a.m. – 4 p.m.

"The ask" ... why are we so afraid of it? Here's your chance to practice the art of the ask with a master fundraiser. In this day-long class, you'll have the opportunity to practice face-to-face asking a real person for a gift, and get invaluable, constructive feedback in a safe setting, featuring friendly competition. The emphasis is on asking individuals, but the skills are effective for foundation officers and corporate representatives as well.

**Instructor:** David Brewton, DRB Community Development Consulting

**Fee:** \$125 (\$115 if paid online)

## Careers in Fund Development

Thursday, Feb. 15 from 5 – 7 p.m.

Fundraising is essential to the success of an organization's mission, but understanding how best to cultivate your career can be difficult. Building a successful career in fund development takes experience, education, passion and skill. If you're just starting out in fund development or looking to advance your current development position, this is the conversation for you! Join three well-rounded and well-respected fundraising professionals as they talk about their own careers including lessons learned, personal strategies and the paths they took to advance to their current positions.

**Moderator:** Peggy Outon, Bayer Center

**Panelists:** Karris Jackson, POISE Foundation; Heather Franz, Robert Morris University; Dave Tinker, ACHIEVA

**Fee:** \$40 (\$30 if paid online) and FREE for members of YNPN Pittsburgh

## Grant Seeking Basics: Strategies for Success

Tuesday, Feb. 20 from 9 a.m. – noon

This interactive course is designed for nonprofit leaders and staff interested in learning more about how to identify, research and select appropriate grant funding prospects to support a nonprofit project or program. The course will focus on the state of grant seeking at the government and foundation level, funding search strategies, and funding prospect selection. The course will provide participants with a copy of the "Are You Grant Ready?" checklist and other resource tools to help guide the planning and pursuit of grant funds.

**Instructor:** Maureen Ryan, Write Connections, LLC

**Fee:** \$65 (\$55 if paid online)

## The Accidental Marketer

Wednesday, Feb. 21 from 9 a.m. – noon

Social media, websites, email campaigns, publicity... all important marketing elements often assigned to nonprofit employees who find themselves "accidental marketers." Often organizations with no assigned marketing or PR staffer distribute those tasks among others who encounter new projects that require new skills. Designed for new marketers, this workshop provides tips and tactics for prioritizing tasks, creating content, developing volunteer support, and creating a plan that's not an accident, but strategic.

**Instructors:** Yvonne Hudson and Lynette Asson, New Place Collaborations

**Fee:** \$65 (\$55 if paid online)



# Nonprofit Management

## How to Manage Volunteers for Success

Thursday, Feb. 22 from 9 a.m. – noon

You have passionate and energetic volunteers helping your organization – how do you ensure that they have an experience they find fulfilling while meeting the needs of the organization? Come learn from two experienced nonprofit managers (who have experience with all levels of volunteers from direct service to boards of directors) who will discuss steps to ensure success. Expect a lively discussion that addresses the specific needs of your organization.

**Instructors:** Don Block and Julie Walker, Greater Pittsburgh Literacy Council

**Fee:** \$65 (\$55 if paid online)

## An Introduction to Planned Giving

Wednesday, Feb. 28 from 9 a.m. – 4 p.m.

Bequests and other types of planned gifts are the lowest cost, highest value gifts nonprofits can generate. If planned giving isn't part of your fundraising program, now is the time to start! In this session participants will learn why planned giving is important for every development program, how to identify planned giving prospects (they may not be who you think they are!) and the simple techniques of a basic, easy to implement planned giving program that will work in any sized organization. Dive more deeply into the world of planned giving in the afternoon session where we'll explore more complex types of gift vehicles, best practice for gift acceptance policies and effective marketing and outreach tactics. The session will include an opportunity to discuss your prospects and discover the best strategies for cultivation and solicitation. All participants will learn and practice talking to their donors about planned gifts. Leave this session ready to improve your relationships with your donors and increase your dollars raised with planned giving.

**Instructor:** Maureen Mahoney Hill, Advancement Advisors

**Fee:** \$125 (\$115 if paid online)

## Before the Ask

Friday, March 2 from 9 a.m. – noon

Great fundraisers are often thought of as individuals who excel at the art of 'the ask.' However, those same fundraisers know the importance of a well-laid plan. This session will teach participants how to craft and forecast a fundraising campaign that will pave the way for success well before 'the ask' even happens. Participants will learn the basics of fundraising planning, how to find their 'hook,' how to find the people, and how to beat the drum.

**Instructor:** Valerie Beichner, Friends of the Riverfront

**Fee:** \$65 (\$55 if paid online)

## Advocacy: The Why, the How, the Now!

Monday, March 5 from 1 – 4 p.m.

Advocacy has become a buzzword that everyone's talking about. This course teaches what advocacy is, how to do advocacy effectively, and the lasting impact advocacy has on your clients and your agency. We'll cover:

- *There is no try...only do:* Advocacy without fear and with results
- *It's all about the base:* Building and maintaining effective coalitions
- *You had me at hello:* Telling your story with purpose, passion and precision
- *It's all connected:* Moving from self to systemic advocacy
- *Power plays:* Knowing who has the power and how to influence those in power

"If you think you're too small to be effective, than you've never been in bed with a mosquito."  
~ African Proverb

**Instructor:** Rev. Sally Jo Snyder, Consumer Health Coalition

**Fee:** \$65 (\$55 if paid online)

## Strategies for Setting Effective Performance Goals

Tuesday, March 6 from 1 – 4 p.m.

This session will explore the changing views on performance goals. Are they helpful tools to ensure focus and good communication or do they do more harm than good? We will discuss how to set effective goals using collaboration and engagement while building in flexibility and empowerment. The SMART approach will be covered along with the critical importance of regular two-way dialogue.

**Instructor:** Phyllis Hartman, ESC Volunteer

**Fee:** \$65 (\$55 if paid online)

## Growing a Major Gifts Program

Thursday, March 8 from 1 – 4 p.m.

Most every nonprofit hoping to grow their voluntary support from individuals wants to have a major gifts program. Many of those organizations have neither the staff nor the budget to do it and those that do often divert their own fundraisers from their major gift focus. This class will look closely at the ingredients, actions and habits that are imperative to pursue major gifts; learn how to segment your donor population and develop and execute prospect strategies; uncover methods to extend the outreach and effectiveness of your current professional and volunteer leaders; and consider the kind of development professional(s) to hire if feasible.

Our definition of 'major gift fundraising' will include outright and deferred gifts. We'll examine examples of both as well as blended/hybrid gifts.

**Instructor:** James Sismour, University of Pittsburgh

**Fee:** \$65 (\$55 if paid online)



## Featured Series

The board's role doesn't start AND end with fiduciary responsibility. Learn how to motivate and empower your new and existing board members to take an active role in finance, human resources, legal issues, and of course, FUNDRAISING, all with the goal of making the most of your board. Classes can be taken a la carte or you may take all four for \$100.

### The Board's Role in Financial Oversight

*Wednesday, March 14 from 4 – 6 p.m.*

Join us as we review the primary ways that board members can fulfill their key fiduciary responsibilities, including avoiding mission drift, participating in the budgeting and auditing processes, reviewing regular financial reports, and understanding the organization's overall financial outlook. We'll answer your questions about serving as a fiduciary and discuss practical strategies for improving your board's ability to fulfill this critical role.

**Instructor:** Evie Gardner, Bayer Center

**Fee:** \$40 (\$30 if paid online **OR** \$100 for the whole series)

### The Board's Role in Keeping it Legal

*Wednesday, March 21 from 4 – 6 p.m.*

In this interactive session with an attorney who focuses on nonprofits, participants will learn the legal responsibilities of being board members, how to minimize the risk of employee claims and other legal issues before they become problems, and the potential consequences of non-compliance with state and federal laws governing exempt organizations.

**Instructor:** Abigail Salisbury, J.D., Salisbury Legal, LLC

**Fee:** \$40 (\$30 if paid online **OR** \$100 for the whole series)

### The Board's Role as Employers

*Wednesday, March 28 from 4 – 6 p.m.*

When determining the role of the board in matters relating to Human Resources, it is critical to recognize and respect the difference between governance and management. This difference may cause nonprofits some difficulty in the treatment of each. The ED has primary responsibility for hiring and managing the staff, while the board's role should be focused on governing the organization. Join us as we discuss how to create an environment in which the board feels confident that it has a sufficiently meaningful role in driving an organizations' mission forward without interfering with the staff's ability to manage the day-to-day affairs. We'll discuss salaries, performance and evaluations, grievances and more.

**Instructor:** Paul Block, ESC Volunteer

**Fee:** \$40 (\$30 if paid online **OR** \$100 for the whole series)

### The Board's Role in Events-Based Fundraising

*Wednesday, April 4 from 4 – 6 p.m.*

Special events are frequently one way that board members fundraise for their organization. Engaged board members are a critical success factor, often making the difference between profit or loss. This session will pair two fundraisers who have worked with countless organizations to increase the profitability of their special events in a competitive marketplace. Our conversation will start at the very beginning of the event timeline to probe the importance of research and the role that it plays in identifying the board connections to potential supporters or when choosing the right co-chairs and committee members. Special events can be powerful friend and money raisers...or they can exhaust the few who carry all of the responsibilities. After this session, you'll have some practical ideas, and tools to more fully engage your board in making your next special event the best you've ever had!

**Instructors:** Peggy Outon, Bayer Center and Delvina Smith, Providence Connections

**Fee:** \$40 (\$30 if paid online **OR** \$100 for the whole series)





# Nonprofit Management

## Strategic Planning: A Must in Turbulent Times

Tuesday, March 20 from 9 a.m. – 4 p.m.

Today's nonprofit environment overflows with challenge, opportunity and change. Strategic thinking, an inspiring vision, and carrying out a solid plan are vital signs for any nonprofit, large or small. With everyone's time at a premium, creating the right strategic planning process for your organization makes all the difference. This full-day workshop provides an in-depth introduction to strategic planning and the opportunity to delve deeply into stakeholder engagement: a critical success factor in shaping and implementing successful strategic plans. A fast-paced introductory overview sets the stage for understanding effective strategic planning. Content includes:

- "Strategic Planning 101" – the key components for a great process and effective plan
- Guided discussion to zero in on your organization's aims for strategic planning
- Options for choosing the right approach for your organization
- A helpful checklist that clarifies important roles for board members, staff and consultants
- An experiential strategic plan "launch" that produces energy and open minds
- Tips for keeping a plan real and alive over time

The workshop continues with a deeper dive into stakeholder engagement, including:

- Meaningful roles for internal stakeholders that build understanding and ownership for the plan
- How to segment priority external stakeholders to be reached for input
- How to balance the right mix of affordable research techniques to build relationships and gain critical input
- Creating a draft core questionnaire for your organization to gain input across all stakeholder groups
- Case study examples of analysis, reporting and how stakeholder input directly translates a completed strategic plan

**Instructor:** Gary Stern, Stern Consulting International

**Fee:** \$125 (\$115 if paid online)

## Strengthening Your Team's Accountability

Tuesday, March 27 from 9 a.m. – noon

All nonprofits are feeling pressure to meet ever-increasing expectations with less time and money than ever before, and stress, burnout and disengagement are common. Yet nonprofits that embrace accountability, results, retention and morale flourish. Why? Because accountable team members negotiate clear agreements, build strong partnerships, and feel more control in outcomes, resulting in more productivity and less stress. Discover the powerful personal benefits of accountability and the strategies to make it happen.

**Instructor:** Len Petrancosta, Peak Performance Management

**Fee:** \$65 (\$55 if paid online)

## A Foolproof Recipe for Building Individual Giving Success

Tuesday, April 3 from 9 a.m. – noon

Individual donors represent 72% of all charitable giving in the United States but remain a mystery to many nonprofits. Join us for a workshop on building your individual giving program and learn more about the importance of individual giving for your organization, how to appeal to all kinds of individual donors, and how to build your own individual giving program. We'll cover the following:

- How to appeal to men and women donors
- How to differentiate giving techniques between generations
- Which individual giving vehicles to use (direct mail, annual giving, events, etc.)
- Using national metrics to educate leadership

You'll leave this interactive course with tools, tricks, and tips for building a great individual giving program!

**Instructor:** Emma Gilmore Kieran, Pilot Peak Consulting

**Fee:** \$65 (\$55 if paid online)

## Nonprofit Storytelling

Wednesday, April 4 from 9 a.m. – noon

Effectively telling your organization's stories is as important as showing the data-backed outcomes. Stories motivate donors, capture volunteers and influence public officials. In this workshop we will talk about what kinds of stories to tell, how to craft your stories for the most impact and how to use media to get your stories out there.

**Instructor:** Wendy Burtner-Owens, Steeltown Entertainment Project

**Fee:** \$65 (\$55 if paid online)



## Featured Series: Conversation, Camaraderie and Coffee!

April is all about panel discussions! Join us on Friday mornings as we talk about how to be better fundraisers, advocates, corporate partners and more! What a great way to end each work week with conversation, camaraderie and coffee.

### Working with Our Foundation Allies

Friday, April 6 from 9 – 11 a.m.

Generous gifts from foundations have often secured the future for regional nonprofits. But there are close to 8,500 nonprofits in southwestern Pennsylvania alone, and foundation leaders have to make hard choices and are challenged to make every dollar count. Come reflect with a few of our region's most thoughtful foundation leaders about how they make those decisions.

**Moderator:** Peggy Outon, Bayer Center

**Panelists:** Laurel Randi, McCune Foundation; Cathy Lewis-Long, Sprout Fund and Karris Jackson, POISE Foundation

**Fee:** \$40 (\$30 if paid online **OR** \$100 for the whole series)

### Working with Our Corporate Allies

Friday, April 13 from 9 – 11 a.m.

With an increased focus on corporate social responsibility, corporations and businesses are more enthusiastic than ever to find nonprofit partners to create mutually beneficial volunteer opportunities for their employees. Let's talk about the prospects for corporate volunteerism and how to make your organization a likely recipient.

**Moderator:** Yvonne VanHaitsma, Bayer Center

**Panelists:** Vernee Smith, FedEx Ground; Ange Loiseau, Covestro

**Fee:** \$40 (\$30 if paid online **OR** \$100 for the whole series)

### Working with Our Media Allies

Friday, April 20 from 9 – 11 a.m.

Every nonprofit needs the media to get its message out. Nonprofit leaders require insight into that world. Join three Pittsburgh media writers who are longtime nonprofit allies as they discuss their role in telling a nonprofit's story through different media channels to our region. We'll have plenty of time for Q & A.

**Moderator:** Peggy Outon, Bayer Center

**Panelists:** Tracy Certo, NEXTpittsburgh; Joyce Gannon, Pittsburgh Post-Gazette and Terry O'Reilly, WESA

**Fee:** \$40 (\$30 if paid online **OR** \$100 for the whole series)

### Working with Unexpected Allies

Friday, April 27 from 9 – 11 a.m.

Learn from leaders in our community who are dedicated to seeing possibility and opportunity in working across differences. Whether it's working with employees with disabilities, those who have been incarcerated, or those new to our country, our panel will explore how success comes when our workforce reflects us all. Bring your questions about how to best create a vibrant, inclusive workforce.

**Moderator:** Peggy Outon, Bayer Center

**Panelists:** James Bennett, Easterseals Western and Central Pennsylvania; Nikki Heckman, Bistro To Go; Sarah Welch, Jewish Family & Children's Service Career Development Center; Melanie Harrington, Vibrant Pittsburgh

**Fee:** \$40 (\$30 if paid online **OR** \$100 for the whole series)



The Bayer Center for Nonprofit Management is partnering with the Allegheny County Bar Association and the Pro-Bono Partnership to provide legal assistance to local nonprofits. Please note that the Bayer Center provides a referral service, not direct legal advice, and cannot offer assistance in cases that involve litigation. To be eligible for the LawLinks program, your organization must be a registered 501(c)3 nonprofit, have a budget of less than \$1 million and reside in Allegheny County.

Questions most frequently revolve around human resources, real estate, taxation, tax-exempt status, bylaws and document review. There is a \$50 application fee for this program. E-mail questions to Carrie Richards at [richardsc@rmu.edu](mailto:richardsc@rmu.edu). For groups seeking to incorporate and/or obtain 501(c)(3) tax exemption, please call the Bayer Center at **412-397-6006** to speak with a start-up counselor.



## Who is Taking Over? Developing Your Next Generation of Leaders

Thursday, April 5 from 9 a.m. – noon

Nonprofits are facing a change of guard in leadership. What assurances exist that the next crop of leaders will be ready to assume the ranks of responsibility in growing your nonprofit toward the fulfillment of your mission? This workshop will provide a systematic process to identify the key elements of what makes a great leader for your nonprofit, where leaders come from within the organization and how to best develop them so they will have the skills and competencies to assume the role when their day arrives.

**Instructor:** Michael Couch, Michael Couch and Associates

**Fee:** \$65 (\$55 if paid online)

## Don't Call Them Interns: The Role of Young Adults in Building Your Organization's Future

Thursday, May 3 from 1 – 4 p.m.

If you are looking for ways to grow your organization's impact, why not start from the ground up – with young adults? This course will focus on the key aspects of developing emerging professionals in ways that lead to REAL professional development for them. We will cover best practices for young adult development that will add value to your organization and launch young professionals into the field. Your next "intern" could be your future executive director or board chair! Learn how to build the kind of professionals that you want working for you.

**Instructors:** Chris Cooke, Amanda Duncan and Katie Robb Sewall, PULSE

**Fee:** \$65 (\$55 if paid online)

## Grantsmanship Training Program

Monday, May 14 – Friday May 18 from 8:30 a.m. – 5:30 p.m. (Friday ends at 1:00 p.m.)

Are you working to change your community? Will more funding help you create that change? Join generations of social advocates who have achieved success by attending our Pennsylvania grant proposal writing course. Learn how to do the research, make a plan, and secure the funding you need.

Join us for the five-day Grantsmanship Training Program. Practice using our proven proposal model — a model that many funders have adopted for their application guidelines — and secure grant funding for the programs your community needs the most. Get expert guidance, hands-on experience, and peer support. Navigate the grant proposal process with confidence and ease.

Learn to pinpoint the funders most likely to support and partner with your organization, collaborate with others to create a data-driven and realistic grant application, and review proposals the way funders do so you'll understand what works and why.

In a follow-up survey, 135 graduates documented they had won grants within six months of their training. In total, these alumni were awarded over \$21 million. Get the only grant-development training proven to produce results.

**Location:** Jewish Community Center of Greater Pittsburgh, 5738 Forbes Ave, Pittsburgh, PA 15217

**Tuition:** \$995 if registered and paid on or before April 2 **OR** \$1,095 after April 2

For questions or to register, please contact [registrar@tgci.com](mailto:registrar@tgci.com) or **800-421-9512**

## 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](mailto:richardsc@rmu.edu).



# Nonprofit Management

## Bylaws Clinic

*60-minute sessions available by appointment*

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.

**Instructor:** ESC Volunteer

**Fee:** \$50 per hour (2-hour minimum required)

## Employee Handbook Clinic

*60-minute sessions available by appointment*

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.

**Instructor:** ESC Volunteer

**Fee:** \$50 per hour (2-hour minimum required)

## HR Clinic

*60-minute sessions available by appointment*

Do your HR policies need updating? 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
- Restructuring benefits and compensation

The session is for any staff person with HR oversight. Bring your materials including employee handbook, performance appraisal form, and anything else HR-related to your appointment.

**Instructor:** ESC Volunteer

**Fee:** \$50 per hour

## Marketing Clinic

*60-minute sessions available by appointment*

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.

**Instructor:** ESC Volunteer

**Fee:** \$50 per hour

## Nonprofit Start-up Clinic

*60-minute sessions available by appointment*

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.

**Instructor:** ESC Volunteer

**Fee:** \$50 per hour (2-hour minimum required)

## Pinpoint Planning Clinic

*60-minute sessions available by appointment*

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 or LawLinks attorney 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.*

**Instructor:** ESC Volunteer

**Fee:** \$50 per hour

## Custom Clinics

Looking for a clinic in something that's not listed? We might be able to customize a clinic just for you! Call Susan Loucks at **412-397-6006** to inquire.





## Covestro Institute for Engagement (CIE) and the Nonprofit Community

CIE provides a structured, engaging way for businesses and nonprofits to build meaningful connections that exchange purpose and value.

### CIE Membership is the Best Deal in Town!

Our generous CIE Champions make it possible for your organization to join for \$250 or \$500 depending on your budget size. This nominal investment covers:

- A customized board retreat with matching of up to two newly-trained board members
- OR
- A skilled team that will work with you to help solve a specific business challenge in 12 weeks
- Discounts on our classes and ongoing support from our team

For more details, visit our website at [CIE-BCNM.ORG](http://CIE-BCNM.ORG) or contact CIE program specialist Jennifer Pease at 412-397-6013 or [pease@rmu.edu](mailto:pease@rmu.edu).

### BoardsWork!

After participating in *BoardsWork!* through a Grable Foundation *BoardsWork!* Champion scholarship, Family Promise renewed as a CIE nonprofit member. They were looking to increase their board numbers with members knowledgeable in human resources, legal affairs, and financial oversight.



Since their outreach to us, they have received – and accepted – two new board members. Executive Director Laura Vincenti said of the program, “Just wanted to touch base to say thanks for the great *BoardsWork!* matches! Both have joined Family Promise’s board and are already proving to be valuable assets.”

Family Promise of Southwestern Pennsylvania connects children and families experiencing homelessness with a network of local congregations and dedicated staff, all focused on providing them with shelter, meals, hospitality, and support until they are able to return to sustainable independent lives in their own homes.

Tom Beaudoin, managing director of compensation and benefits at FedEx Ground, attended a *BoardsWork!* training in July 2017. He told us he was interested in nonprofits that work with children, youth, and the homeless. Based on his skills and expertise, we matched him to Family Promise. And it was a perfect fit!



“After the *BoardsWork!* training, I was matched with Family Promise based on my expressed area of interest. I met with the board president and attended a meeting to share my background and learn more about the organization before I was elected to the board. The training prepared me for what to expect and enabled me to make an immediate contribution to an organization with a mission I am very passionate about!”

### Skills-Based Volunteering

PNC Foundation’s Grow Up Great program is extending a new resource to their partners – the professional skills of their employees through Skills-Based Volunteering. Heritage Community Initiative tasked their team of four PNC employees with helping the organization perform a cost analysis of its recently internalized nutrition services department, as well as enhance their tracking mechanisms and current delivery schedule.



Headquartered in the heart of the 20 Mon Valley neighborhoods they serve, Heritage Community Initiatives has an on-the-ground understanding of the needs of local communities and residents. Its mission is to enable individuals and organizations to improve

health, education, economic strength, and social vitality in their communities. The team quickly gained an appreciation for the nonprofit sector and the challenges they face, including strenuous regulatory guidelines, limited resources and staff that carry out multiple roles.

Laura Kelley, Heritage’s director of business development said, “Transitioning to skills-based volunteerism from task-based volunteerism has given our organization long-term, sustainable solutions to deep-rooted challenges.” The team’s suggestions included a map website to optimize routes for nutrition deliveries with the possibility of expanding to senior services.

Heritage’s skills-based volunteering team delivered analysis of the organization’s major programming, including meal planning, pricing, nutrition costs, transportation, point of service, and expense tracking.

This point of service sheet analysis and recommendations will help with planning and pricing strategies.



**Thank you, CIE Champions, for helping nonprofits gain access to valuable business resources through your financial support!**





# 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 consultants have a broad and deep knowledge of the technology issues challenging nonprofits. Whether in your office or in our classroom, we speak English, not Geek, so that you can understand the entire process. If you need a new website, can't figure out what fundraising software to buy or just feel like chilling out at Excel Day, you'll find that our support is always real, never virtual.

Some of the ways we assist organizations are:

- Assessing the state of technology being used and helping to prioritize improvements
- Developing technology plans to enhance long-term impact
- Creating social media plans and strategies
- Building and improving databases that track key organizational information
- Providing custom training on software applications at the Bayer Center or on-site
- Planning and developing websites
- Supporting sound technology decisions – projects have included: software selection, vendor RFP development and selection, policy and procedure development, development of staff job descriptions and hiring of IT staff

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

## Bagels and Bytes

Join your nonprofit techie colleagues for informal learning and networking in this popular monthly convening. If you're officially (or unofficially) responsible for your nonprofit's technology challenges, join us! Our group is an affiliate of TechSoup's NetSquared program and the Nonprofit Technology Network's (NTEN) Nonprofit Tech Club program. All of our locations are ADA accessible unless otherwise noted.

Visit <https://bagelsbytesallegheny.wordpress.com> to learn more or find us at <https://www.meetup.com/Bagels-Bytes>.

## Bagels and Bytes - Allegheny

FREE, but you must RSVP to Shelby Gracey at [gracey@rmu.edu](mailto:gracey@rmu.edu) or **412-397-6000**.

*Wednesday, Feb. 7 from 8:30 – 10 a.m. at Grow Pittsburgh, 6587 Hamilton Ave #2W, 15206*

*Wednesday, March 7 from 8:30 – 10 a.m. at Grow Pittsburgh, 6587 Hamilton Ave #2W, 15206*

*Wednesday, April 4 from 8:30 – 10 a.m. at Frick Art and Historical Center, 7227 Reynolds Street, 15208*

*Wednesday, May 2 from 8:30 – 10 a.m. at Frick Art and Historical Center, 7227 Reynolds Street, 15208*

## Bagels and Bytes - Westmoreland

Breakfast cost is individual responsibility. RSVP to Gina McGrath at [ginam@ywcawestmoreland.org](mailto:ginam@ywcawestmoreland.org) or **724-834-9390 x107**.

*Location is at King's Restaurant, Hempfield Pointe, 6297 Route 30, Greensburg, PA.*

*Tuesday, January 16 from 8 – 9:30 a.m.*

*Tuesday, March 20 from 8 – 9:30 a.m.*

*Tuesday, May 15 from 8 – 9:30 a.m.*



## EXCEL DAY

### Introduction to Excel

*Thursday, March 22 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
- Printing your worksheet

### Intermediate Excel

*Thursday, March 22 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
- Chart creation and formatting

**Instructor:** Cindy Leonard, Bayer Center

**Fee:** \$65 (\$55 if paid online) per session **OR** \$100 for the whole day

# Custom Training

Got a great idea for a workshop? Searching for something that's not featured in our catalog? Having a tough time aligning schedules to attend a class? Custom training may be just what you're looking for. We can help you set up every aspect of your next staff workshop.

Frequently requested topics include technology, nonprofit finance, board development, fundraising, supervision and leadership, and staff management.

Our extensive experience in conducting workshops can be tailored to your organization's specific needs. For more information, contact the Bayer Center at **412-397-6000** or [bcnm@rmu.edu](mailto:bcnm@rmu.edu).



# Technology

## Work Smarter Not Harder: Technology Integration for any Size Organization

Social media, email, marketing, accounting – everything has a system. Does it feel like managing a circus? Don't throw your hands up! This fast-paced, practical course will demystify systems and teach you how to pull the pieces together effectively and efficiently. Integrating your technology saves time, money, headaches, and expedites growth. You'll leave with a solid understanding of how digital systems work together, an integration plan for your organization, and a toolbox of resources to help you learn more and implement your plan.

### Intro to Integration: What it Means, How It Works and Why It Matters

*Monday, April 9 from 1 – 4 p.m.*

Discover why integrating technology is essential to the growth of your organization and how to keep your sanity during the process. Learn commonly-used technical terms and techniques, and what it means to integrate technology. We will also explore why technology integration is a mindset and leadership issue, and how to foster collaboration.

### Doing Your Homework: Creating a Technology Plan That Grows with Your Organization

*Monday, April 16 from 1 – 4 p.m.*

Learn how to identify the technology needs of your organization now, while keeping an eye on the future. We will discuss how to evaluate systems like Mailchimp, Quickbooks, etc., to create ease-of-use and compatibility for your organization. Additionally, you'll learn how systems can help you identify new opportunities.

### Organizing and Using Your Data

*Monday, April 23 from 1 – 4 p.m.*

Discuss different data metrics, what they mean, and how to decide which metrics matter for your organization. You'll learn how to use data to tell your story and we'll cover data visualization as well – what it means and how to do it.

**Instructor:** Connie Capiotis, Digital Bridges Pittsburgh

**Fee:** \$65 (\$55 if paid online) per session **OR** \$150 for all three classes in the series

## Writing for the Web and Social Media

*Tuesday, April 17 from 9 a.m. – 4 p.m.*

Writing content for your website or social media is very different from writing for other types of communications because of the way people read and use the Web. Learn how to improve your written website and social media content, increase your site's usability as well as readability and improve the effectiveness of your online communication channels.

**Instructor:** Cindy Leonard, Bayer Center

**Fee:** \$125 (\$115 if paid online)

## Advanced Excel

*Thursday, April 19 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:** Cindy Leonard, Bayer Center

**Fee:** \$125 (\$115 if paid online)

## Assessment and Analysis of Technology Risk

*Tuesday, May 1 from 1 – 4 p.m.*

What is Technology Risk management and where do you begin? This course is intended to give management a baseline to develop an infrastructure that is manageable to navigate the risk related to the technology structure within the organization.

**Instructor:** Stephanie Bucklew, SLB Consulting and Todd Whiteman, Enscoe Long Insurance Group

**Fee:** \$65 (\$55 if paid online)

## DIY Websites with WordPress

*Thursday, May 17 from 9 a.m. – 4 p.m.*

Are you a website novice who needs to know how to design a basic website that is easy to update and has room for future expansion? WordPress is a website content management system that is great for building and managing websites, even for beginners. Nonprofit staff without previous web design experience and experienced web designers who want to learn WordPress are welcome.

**Instructor:** Cindy Leonard, Bayer Center

**Fee:** \$125 (\$115 if paid online)











# Instructor Biographies

**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, Crisis Center North and Pittsburgh Festival Opera.

**Randee Baer** is a financial advisor within the Farrell Group at Hefren-Tillotson. As an integral part of the team, she works closely with her team to offer their clients an extra-personal relationship that an individual might be hard-pressed to find elsewhere. Randee is a CERTIFIED FINANCIAL PLANNER™ practitioner, an Investment Advisor Representative, a Registered Representative, and a Licensed Agent for Life, Accident and Health Insurance. She is a graduate of Grove City College with a B.S. in Finance. Randee and her husband Davis reside in Cranberry Township and enjoy staying active in their church community.

**Riley Baker** is the director of the national service program, The Retired and Senior Volunteer Program (RSVP), and a senior staff member of Pittsburgh Cares. As an advocate for service and impact, Riley has dedicated himself to the promotion of volunteerism and is passionate about connecting the micro needs of local communities to resources available at the national level. Riley has experience measuring and communicating impact data across various levels of government accountability and building community narrative.

**Valerie Beichner**, Executive Director of Friends of the Riverfront, is a seasoned nonprofit professional with experience in human resource, information technology, facility and organizational efficiency, fundraising and more. She holds expertise in green building and green building products, sustainable corporate culture, community and economic development, advocacy and organizational leadership. Valerie is also President of Élan Evolutions, LLC, a nonprofit management consulting firm. Valerie earned a BA in Political Science at Clarion University and an MS in Organization Leadership from RMU. An avid runner, Valerie is an assistant coach for a local Girls on the Run team and enjoys volunteering in multiple other capacities within her community.

**James G. Bennett**, CEO of Easter Seals Western and Central Pennsylvania, has over four decades of experience in human services, ranging from early intervention programs to elder care services. During his time at Easter Seals, Jim has developed and expanded the organization's vocational/employment programs, which have generated in excess of \$80 million. These programs contract with federal and state agencies to employ over 120 people in facility and community settings. Jim has served on numerous boards including UniqueSource, Neighbors in the Strip, and Brookwood Center, Inc. He remains current and involved in policy and regulatory issues in Western PA through his participation in the Provider Alliance.

**Don Block** is Executive Director of Greater Pittsburgh Literacy Council (GPLC), where he has worked since 1984. He has managed volunteers at all levels from direct service to boards of directors. At GPLC, over 500 volunteers are involved in all aspects of the organization. Under Don's leadership, GPLC received the Wishart Award for Excellence in Nonprofit Management, and the organization holds the Standards for Excellence accreditation from the PA Association of Nonprofit Organizations. Don has a master's degree from Indiana University, Bloomington, and he served in the Peace Corps.

**Paul Block** has 35 years' experience in the arenas of nonprofits and financial planning and was formerly the Manager of the Tax Department of Albanese Sinchar Smith & Co. Now self-employed and an ESC volunteer, Paul serves on numerous local nonprofit boards including Humane Animal Rescue, The Bach Choir of Pittsburgh, Chatham Baroque, Pittsburgh Schweitzer Fellowship Program and POWER, in many cases serving as treasurer and/or on the finance committee. He is a certified CPA and holds master's degrees in accounting and taxation, as well as a JD from the Duquesne University School of Law.

**Dave Brewton** grew up in Pittsburgh and loves raising money to advance missions that matter. He's done so in Pittsburgh for more than 32 years, in the fields of community development (Executive Director of Breachmenders, Inc., Director of Real Estate, Hazelwood Initiative), health care (Associate ED for East Liberty Family Health Care Center) and faith-based ministries (Coalition for Christian Outreach, others). He also loves teaching classes at the Bayer Center that combine theory, practical how-to tips and inspiration. Just don't ask him to sing, because he will!

**Stephanie Bucklew** has over 20 years of experience in enterprise risk management with a concentration in the financial services industry. During this time, she served 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.

**Wendy Burtner-Owens** has more than 25 years' experience managing and growing foundations and nonprofit organizations. Before joining Steeltown Entertainment Project as COO, Burtner-Owens 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. She has also been an independent consultant to start-up businesses, foundations and nonprofit organizations. Wendy has a history of working collaboratively to develop strong internal and external relationships. She is also a successful fundraiser – obtaining individual donations, foundation and government grants from \$30 to \$3,000,000.

**Connie Capiotis** has over 17 years of experience in business development and marketing, a master's degree in competitive intelligence systems and a passion for growing organizations. As the Founder of Digital Bridges Pittsburgh, Connie teaches digital literacy skills and career development to those who need it most. She uses her experience and unique skill sets in strategy and data analysis to help organizations and individuals create smart, attainable plans that propel them from where they are to where they want to be. "Start where you are and move up" is Connie's favorite mantra.



# Instructor Biographies

**Tracy Certo** is founder and publisher of NEXTpittsburgh, the online magazine about the people driving change in our region and the innovative things happening in Pittsburgh. NEXT launched in 2014 and is attracting 200,000 visitors monthly. Prior to starting NEXT, she led Pop City for nearly eight years as editor and publisher. She was also editor of AIA Pittsburgh's Columns Magazines and was a freelance writer and marketing consultant for 15 years. She worked for Katz Radio in Los Angeles following her early career in media sales in Pittsburgh.

**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 15 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 and a member of The Nonprofit Partnership of Neighborhood Allies.

**Michael Couch** has made a career out of improving the performance of organizations and their leaders. Starting with a graduate degree in Organizational Psychology, Michael has over 30 years' experience leading organization effectiveness, human resources, operations, and a strategic business unit. Since starting his own strategic talent management practice, Michael has helped improve the performance of over 50 for-profit and nonprofit organizations. In his work with organizations and leaders, he focuses on results and evidence-based practices, shying away from low impact approaches and passing fads.

**Amanda Duncan** is the Recruiting and Partnership Coordinator of PULSE. Amanda discovered her passion for servant leadership in 2003 when she joined AmeriCorps with the Jumpstart Pittsburgh program. She became a site manager with that organization after graduating from the University of Pittsburgh in 2006 with a B.S. in Psychology and Italian. In April 2014, Amanda received her master's in public policy and management from the University of Pittsburgh's Graduate School of Public and International Affairs. Amanda works remotely with PULSE from her hometown of Erie, PA.

**Gregory and Christine Farrell** lead a unique group within the Hefren-Tillotson family. Greg is a CERTIFIED FINANCIAL PLANNER™ practitioner and a Senior Vice President at Hefren-Tillotson. Working together with his team, they focus on identifying their clients' personal concerns and developing a clear, written framework used in guiding current and future financial decisions. Greg Farrell earned a Bachelor of Science degree in Business Economics from the Behrend College of Pennsylvania State University. Greg lives near Hartwood Acres, and has an active home life with three boys and two Siberian huskies.

**Heather Franz**, Associate Director, Corporate and Foundation Relations at Robert Morris University, grew up in rural Central PA and has an undergraduate degree in French and Africana Studies from Pitt. In 2011, Heather moved to Lille, France to teach at a public middle school. Upon her return in 2013, Heather began working in community development in Philadelphia where she worked on sustainability fundraising in some of the nation's poorest neighborhoods. Later, she would spearhead a \$16.3M capital campaign in Lancaster, Pennsylvania to renovate a historic theatre. At RMU, Heather brings a background of grant writing, government relations and individual fundraising.

**Joyce Gannon** is a business news writer for the Pittsburgh Post-Gazette, whose coverage ranges from breaking news on major corporations, nonprofits and the city's foundations to trend stories on charitable giving, women in business, small business owners and startup entrepreneurs. She began her journalism career at her high school newspaper and became passionate about newspapers while working as a reporter and arts section editor for The Daily Collegian at Penn State University. She later joined the Pittsburgh Business Times where she wrote about the emergence of the technology sector in Pittsburgh after the collapse of the steel industry.

**Melanie Harrington** is President and CEO of Vibrant Pittsburgh, a nonprofit economic development organization that was established to build a more diverse and inclusive Pittsburgh region by spearheading initiatives to attract, retain, and elevate a diverse workforce. She is also an adjunct professor at the University of Pittsburgh's Graduate School of International and Public Affairs. Melanie received her Juris Doctorate from Emory University School of Law and her B.A. from the University of Pennsylvania in Psychology. She serves on the Boards of Sustainable Pittsburgh; the Downtown Pittsburgh Partnership; the YMCA of Greater Pittsburgh; and the Diversity Collegium.

**Phyllis G. Hartman**, SHRM- SCP, SPHR, the founder and President of PGHR Consulting, Inc. has 25+ years in HR. A speaker on recruiting, workforce development and other HR and business topics, Phyllis is a member of the SHRM Ethics Expert Panel and the Government Advocacy Team. She has an MS in HRM, La Roche College and is a certified Senior Professional in HR. Phyllis has written 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 a volunteer HR consultant for the Ward Home, Inc., and a past Board of Trustee member for the Homeless Children's Education Fund.

**Denise Henning** is a CPA with over 30 years' experience, including 16 years with Ernst & Young. Most recently, she served as the Interim Vice President of Finance and Operations for Bay Area Rescue Mission and Chief Financial Officer for City Mission in Washington, PA. Denise is passionate about building and strengthening the infrastructure of organizations to enable them to become financially sustainable, and position them for growth, which led her to pursue coaching and leadership development training. Denise recently earned certification in the Energy Leadership Index Assessment and Energy Leadership Development System, and is currently pursuing her Certified Professional Coach designation.



# Instructor Biographies

**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, Pittsburgh Festival Opera, Crisis Center North, and Pittsburgh in the Round. 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.

**Seth T. Hufford** serves as Partner at The People Group, a consultancy that builds people capacity to create ideal organizations and communities. Working across all three sectors, Seth has engaged diverse groups of people in tackling complex challenges, addressing interpersonal dynamics, and producing results. Prior to founding The People Group, Seth managed global executive education programs at Carnegie Mellon University's Business School, directed Coro's Leadership New York program, and facilitated Leadership Pittsburgh's Leadership Development Initiative. He has also served as chief of staff to an elected official, directed economic development at a Chamber of Commerce, and managed client projects at Booz Allen Hamilton.

**Karris M. Jackson** is Vice President of Programs at POISE Foundation, a community foundation focused exclusively on supporting the African American community, where her responsibilities include managing the Foundation's grant-making portfolio, convening community stakeholders and advancing the foundation's mission through leadership and advocacy. A published author, blogger and lecturer on social justice, leadership and philanthropy, Karris has a strong desire to push the boundaries of philanthropy to be more inclusive and effective at addressing issues impacting the Black community. Karris holds a BA in English from Allegheny College, an MS in secondary school administration from Duquesne University and a certificate in nonprofit management from Harvard University.

**Emma Gilmore 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 MA from Columbia University in Organizational Psychology, an MPA from American University in Nonprofit Management and a BA from Connecticut College. Emma is a dedicated volunteer for The Ellis School for Girls, her alma mater, and for Girls on the Run.

**Lisa M. Kuzma** is Senior Program Officer at the Richard King Mellon Foundation. Prior to joining the Foundation, she worked for 20 years in the commercial banking industry, then shifted her financial management background to assisting nonprofits achieve long term sustainability with Deloitte & Touche and then at the Bayer Center for Nonprofit Management at Robert Morris University. Over this period, Lisa had the privilege of working with nonprofits to build income streams, diversified contributed revenue bases and rationalized expense structures in many innovative and forward-thinking ways. She received her bachelor's degree in finance from the Pennsylvania State University and M.B.A. from Duquesne University.

**Joe Lantz**, CFA, CAIA is currently Vice President – Institutional and Analytical Services at Federated Investors and holds both the CFA and CAIA Charter Holder designations. He has over 20 years of investment industry experience including Investment Consulting, Investment Advisory, Relationship Management, and Investment and Market Research. Joe's academic credentials include an MBA from the University of Pittsburgh and a B.S.B.A. from Duquesne University. He serves as the Treasurer of CFA Society Pittsburgh and developed the society's Annual Endowments & Foundations Conference. Additionally, he sits on the investment committee of the United Way of Allegheny County.

**Cathy Lewis Long** is the Executive Director of The Sprout Fund, a national leader in catalytic funding, network stewardship, and the art of facilitation. Sprout helps foundations, nonprofits, companies, and governments make an impact on the issues they care about most. She is an active member of many of Pittsburgh's civic and cultural organizations and serves on the Board of Trustees of The Pittsburgh Cultural Trust. Formerly, she served on the board of The Ellis School, Grantmakers of Western Pennsylvania, the Phipps Conservatory & Botanical Gardens, and other organizations. Cathy graduated from Carnegie Mellon University with degrees in Professional Writing and Literary Cultural Studies.

**Ange Loiseau** immigrated to the United States at the age of 12 from Port-au-Prince, Haiti. She earned a bachelor's degree from CUNY Queens College in media studies, and later moved to Pittsburgh where she earned her master's degree in journalism and mass communication from Point Park University. In her role as Community Affairs representative at Covestro, reporting to the Head of Sustainability and Corporate Social Responsibility (CSR), she is responsible for two of three aspects of Covestro's Ignite, Imagine, Innovate (i3) CSR program – i3 Give and i3 Engage. Ange handles donations and sponsorships across the U.S., as well as fosters employee engagement in the Pittsburgh community.

**Maureen Mahoney-Hill**, CFRE, is an independent nonprofit consultant who helps build fundraising, communications and marketing capacity, specializing in planning and strategy development for major and planned gifts. She also provides fundraising audits and feasibility studies; board development and training; policy development; writing and production of marketing and communications materials; crafting of proposals and solicitation pieces; prospect evaluation and cultivation/solicitation planning. Maureen holds a bachelor's degree in human development from Penn State and a master's degree from the School of Social Work at Pitt. Maureen served on the board of Pace School for thirteen years for which she was presented with the Patricia U. Bluestone Leadership Award 2011.

**Sandra Marsh-McClain** is the RISE program manager at Pennsylvania Women Work. Previously, she worked in the Professional Development Services department at Carnegie Mellon University as a Staff Development Specialist. Additionally, she has been a member of the ordained clergy in the United Methodist Church for 24 years where she served in numerous church settings including the role of consultant working with area churches through times of discernment, change and strategic planning. In 2015, she earned her Master's Degree from La Roche College in Human Resources with an emphasis in Organizational Development, Learning and Change. She also holds a master's degree from Southern Methodist University.





# Instructor Biographies

**Terry O'Reilly** is President and CEO of Pittsburgh Community Broadcasting Corporation. An award-winning producer, journalist and executive, his resume includes senior roles at ABC News/The Walt Disney Company, The Weather Channel, Hubbard Broadcasting Company and Westinghouse Broadcasting. His work has been recognized with a National Daytime EMMY® Award, over two-dozen Regional EMMY® Awards, and a film selected for the 2012 Sundance Film Festival. Terry is a past Trustee of the National Academy of Television Arts and Sciences (NATAS), past Chairman of the Royal Television Society (North America) and is a voting member of the British Academy of Film & Television Arts.

**Katie Outon** is a Pennsylvania licensed attorney, of counsel to Goldblum Sablowsky, LLC. She handles a wide range of legal issues, including estates, business law, and contracts. A graduate of University of Pittsburgh School of Law, Katie was honored as a Distinguished Public Interest Scholar for her work teaching Peer Mediation and Constitutional Literacy at a local high school. Prior to her legal career, Katie lived in Austin, Texas, where she managed a chain of doggy daycares and developed a passion for mindfulness and personal growth. She loves to cook, spend time outdoors, and read memoirs by adventurous women.

**Mary C. Parker**, associate at The People Group, is an international dialogue facilitator, trainer, certified life coach, and improv comedian who is on a path to leave the world better than she found it. She supports organizations and individuals in identifying their values, amplifying their voice, and designing a more inclusive vision with a process rooted in experiential learning and intentional change theory. Prior to consulting with organizations and individuals, Mary served as the Director of Training and Learning Development for Coro Pittsburgh. She is an AmeriCorps Alum and One Young World Ambassador.

**Len Petrancosta** started his career as an entrepreneur, owning and operating restaurants. After accepting a job with Sysco, he progressed through sales management into leadership and executive roles, and was named president and CEO of the Pittsburgh division in 2008. He resigned from Sysco in 2011 to start his "second" life and career and now Len uses his talents to serve nonprofits as an ESC volunteer and board member for Light of Life and CEED. He is currently COO for Peak Performance management, a sales and leadership training and coaching company.

**Laurel Randi** joined the McCune Foundation in 2006, first as a Program Officer, then becoming the Foundation's third Executive Director in 2016. Laurel works closely with the Foundation's Distribution Committee to develop and execute the sunset strategy guiding the Foundation's final 12 years. In addition to her strategic roles, Laurel manages a portfolio of grants focused on higher education, community and economic development, and the region's civic institutions. Laurel sits on the boards of Neighborhood Allies, Pittsburgh Urban Initiatives, Strategic Investment Fund, and Grantmakers of Western Pennsylvania. Laurel worked for ten years at The Pittsburgh Project, and for three years prior at Carnegie Mellon.

**Katie Robb Sewall** is a Program Coordinator with PULSE. Katie received a BA in Psychology from Messiah College in 2008. After graduating, she started to dream about making a difference locally. She and a few friends created an intentional community in Harrisburg, PA where they lived together, invested in their neighborhood, and worked in public service. She moved to Pittsburgh to get her masters in professional counseling from Carlow University and then did family counseling with low-income families. She spent the last three years before PULSE in Erie, PA, focusing on coaching college students on career development at Penn State Behrend.

**Maureen A. Ryan**, principal of Write Connections, LLC is a service-oriented business and education professional with over 25 years combined experience in grant development, writing and administration working with nonprofits, community- and faith-based groups and for-profit companies. Maureen has raised more than \$60 million in federal, state and city/county government and corporate and private foundation grants in Connecticut, Delaware, Maryland, Ohio, Pennsylvania, Virginia and West Virginia. Grants have been secured for programs and initiatives related to work in the fields of human/social services, K-12 and post-secondary education, STEM education, workforce development and career exploration, manufacturing, technology, engineering, biotechnology, energy, community development, science and physical and behavioral healthcare.

**Abigail Salisbury**, J.D., MPPM, is a PA-licensed attorney whose law practice, Salisbury Legal, LLC, focuses on serving the particular legal needs of nonprofits. As the former Executive Director of JURIST, a nonprofit legal news organization at Pitt Law, Abigail trained and managed several dozen volunteer staffers. Before starting her solo practice, she worked on international law and development projects in Kosovo, Ethiopia, and Senegal, and also worked as an academic research contract negotiator.

**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 non-profits 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.

**Delvina L. Smith** is the Director of Development at Providence Connections where she spearheads development efforts. Previously, Delvina served as the Director of Events at Musicians on Call, a national nonprofit organization that brings live and recorded music to the bedsides of patients in healthcare facilities where she oversaw the fundraising, planning and production of the organization's national events. Delvina is a member of the Leadership Development Initiative with Leadership Pittsburgh, is a board member of YNPN PGH, and sits on the PLSG Advisory Board. She holds a bachelor's degree from Hobart and William Smith Colleges, and is excited for her wedding in May 2018!



# Instructor Biographies

**Lisa-Ann Smith** is a highly motivated professional with a diverse background gained from over 30 years' experience in a variety of industries, nonprofits, and consulting work. She has expertise in project management, process improvement, organization development, training, and team building and a proven ability to lead teams. Lisa-Ann is effective in analysis, design and implementation of planned changes, both technical and non-technical, innovative in developing solutions and committed to life-long learning.

**Vernée Smith** has a diverse background in both corporate and nonprofit organizations, which gives her unique insight and perspective into corporate citizenship and charitable giving. As the Community Relations Coordinator at FedEx Ground, she supervises the charitable contributions process for the corporation. She has worked for companies such as UPMC Health Plan, Wyndham Hotel Group, Propel Schools, Pittsburgh Ballet Theatre, and the Pittsburgh Cultural Trust. She has served on committees for the City Theatre and Bricolage Production Company and is a board member of the Pittsburgh New Works Festival. She has also participated in Diversity and Inclusion committees for her corporate employers.

**Rev. Sally Jo Snyder** is an ordained minister in the United Methodist Church and works in justice ministry settings as a community organizer on local, state and national levels, focusing on issues which impact marginalized populations, children, the impoverished, members of the LGBTQ community and people with disabilities. Since March of 2007, Snyder has been on staff of the Consumer Health Coalition where she is the Director of Advocacy and Consumer Engagement. Sally Jo serves as the Vice-Chairperson for the Pennsylvania Governor's Advisory Committee for People with Disabilities and is chairperson of the Health Workgroup.

**Gary J. Stern** is president of Portland, Maine-based Stern Consulting International, specializing in governance, strategic planning, business planning and marketing with nonprofit organizations, congregations, associations and multi-sector collaborations. Gary edited the 2nd edition of the *Drucker Foundation Organizational Self-Assessment Tool*, wrote the *Tool Process Guide*, and led the Drucker Foundation International Training Team. He is author of *Marketing Workbooks for Nonprofit Organizations: Volume I: Develop the Plan (Second Edition, 2001)*, which was adapted as the official marketing workbook of United Way of America, and *Volume II: Mobilize People for Marketing Success*. Both are in circulation around the world.

**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 a Master of Public Affairs 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 a MISST from Muskingum University. He is also a graduate of Leadership Works – Indianapolis, Class III.

**Amanda Trocki** serves as the Executive Director of Pittsburgh Cares. Passionate about service and the city of Pittsburgh, Amanda is constantly seeking new and creative ways to get others and herself involved and giving back to the community. Prior to her role as Executive Director, Amanda served as the Director of Corporate Programs at Pittsburgh Cares, working with companies throughout the Pittsburgh region to develop employee volunteer programs, customized corporate days of service, and establish best practices in corporate volunteerism. Amanda is an alumna of La Roche College and Public Allies Pittsburgh.

**Julie Walker** is the AmeriCorps Program Manager for Greater Pittsburgh Literacy Council. She graduated from Penn State University with a degree in Film and Video and a minor in English, and spent two years as a member of Literacy\*AmeriCorps Pittsburgh before joining the staff of GPLC. Julie has previously presented at the PennSERVE New Program and Staff Orientation, the National Literacy\*AmeriCorps Conference, and the PAACE conference. She enjoys writing, reading books meant for kids, playing board games and video games, getting out in nature, and being a mother. To date, she has guided 179 AmeriCorps members on their service journeys.

**Todd Whiteman** is the Executive Vice President at Enscoe Long Insurance Group, specializing in providing programs and consulting to the nonprofit sector. He is an active member of the community, including board service with Association of Fundraising Professionals and Pittsburgh Planned Giving Council. Todd was a founding member and first President of Young Nonprofit Professionals Network Pittsburgh, and worked to promote an efficient, viable and inclusive nonprofit sector focusing on the growth, learning and development of young professionals. His commitment to the sector also includes Board Service and Volunteer Work with The First Tee of Pittsburgh, Mental Health America Allegheny County, Junior Achievement and others.

## Applied Research at the Bayer Center...

The 74% Research Project was sparked after reporting a gender wage gap in every iteration of the Wage and Benefit Survey since its inception in 2002. From this research we found that local nonprofit organizations and individuals are ill-prepared for the pending retirement boom.

## This got us thinking...

Approximately 300 nonprofit employees responded to a questionnaire about their individual savings habits and their organization's policies and procedures. Our forthcoming research publication will provide greater detail on the following findings:

- The regional nonprofit sector is educated and long tenured, yet these characteristics do not translate into better preparation for retirement.
- As a result of a higher median age, a significant portion of regional nonprofit executives plan to retire within the next 10 years.
- Organizational processes and systems to support retirement are spotty at best.

However, despite the dismal statistics, there is optimism for change. The research publication will also suggest solutions for our region: solutions to support local organizations and the individuals who have dedicated their lives to serving our community.

# WHAT NOW?

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

### THE NONPROFIT SECTOR STANDS AT A PRECIPICE.

The response of the community will shape the future of nonprofits. Are we ready to discuss hard questions of retirement and the treatment of the nonprofit community workforce?

### REALITY BY THE NUMBERS:

# 10,000

Baby Boomers are turning age 65 per day, and will continue to cross that threshold at that daily rate for the next 19 years.

nonprofits employ  
**1 IN 5**  
workers in the region.

**69%**  
of executives plan to or could retire in the next 10 years.

**49%**  
nonprofit professionals report having \$50k or less in retirement savings.

### RETIREMENT RATE? WE ARE DOING THE MATH.

Take the journey through our research and follow nonprofit stories as the most seasoned leaders and staff members of our communities' vital nonprofits move into retirement.

## THIS PIONEERING BCNM PROJECT BRINGS VITAL RESEARCH, CONVERSATIONS, AND EXPERTS TOGETHER TO EXPLORE:

The **RAMIFICATIONS** of these retirements on the organizations that serve our communities.

The need for **PREPARATION** of the next generation of leaders.

**IDEAS** to improve the prospects for all nonprofit employees.

### PURPOSE-DRIVEN FOUNDERS AND LEADERS ARE FACING RETIREMENT.

Southwestern Pennsylvania is a region dense with nonprofit organizations that deliver services of real consequence. Teetering between eventual retirement and possible encore careers, a massive core of the region's seasoned nonprofit professionals are not going anywhere. They are among the most highly educated and least financially prepared individuals to face retirement.

Many organizations have long-tenured executives with boards who have never needed to replace them. These same organizations frequently have long-standing funding relationships. Nonprofit human resources are often weak. Succession planning is not the norm. New ideas, new blood are challenging to the status quo—but the clock is ticking!

Research findings from the Bayer Center for Nonprofit Management at RMU indicate this generation of experienced nonprofit leaders and employees may bring uncertainty to both their own futures and to the stability of their organizations. Findings confirm that tools for retirement planning for individuals and succession plans for nonprofit organizations are scarce. How nonprofits respond to this reality will shape the future of the sector.

Watch [tinyurl.com/BCNMWhatNow](https://tinyurl.com/BCNMWhatNow) for news and research findings.





# Bayer Center Staff

**EXECUTIVE DIRECTOR**  
Peggy Morrison Outon

**CONSULTANT,  
ORGANIZATIONAL DEVELOPMENT AND FINANCE**  
Evie Gardner

**OFFICE COORDINATOR**  
Shelby Gracey

**WORK STUDY**  
Allison Harnsberger

**CONSULTING TEAM LEADER**  
Cindy Leonard

**SENIOR CONSULTANT,  
ORGANIZATIONAL DEVELOPMENT AND STRATEGY**  
Susan Loucks

**PROGRAM SPECIALIST, CIE**  
Jennifer Pease

**PROGRAMS TEAM LEADER**  
Carrie Richards

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Carrie Bennett Tancaitor

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## FUNDERS

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The Bayer Center is proud to partner with:



The Allegheny County Bar Association  
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The Bayer Center is an active member of the following organizations:



# Course Registration

## REGISTRATION INFORMATION

The registration deadline for all classes is one week before the course begins (or the first session of a series). Register early – space is limited. You may register for any of the courses online at [rmu.edu/bcnmregistration](http://rmu.edu/bcnmregistration) or by calling **412-397-6000**.

## SCHOLARSHIPS

A limited number of partial scholarships are available to organizations demonstrating significant budget restraints. Please complete our scholarship application online for consideration at [BCNM-RMU.ORG/ClassesEvents](http://BCNM-RMU.ORG/ClassesEvents). For more information, visit the education section of our website at [BCNM-RMU.ORG](http://BCNM-RMU.ORG) 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. If payment has not been made in advance and the individual fails to attend, payment is still required and will be invoiced. 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\*

### Online payments:

A discount (see individual class listing for amount) will be applied for payments received online at the time of registration.

### 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.

### BoardsWork! Award Agencies:

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

- \* Not applicable for special events and convenings, including 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.