WHAT NOW?

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

RMU ROBERT MORRIS™

BAYER CENTER FOR
NONPROFIT MANAGEMENT

"WE SEE A SECTOR THAT SELDOM CALLS THE HIRING PROCESS TALENT ACQUISITION, A SECTOR THAT TOO INFREQUENTLY GROWS ITS OWN INTO LEADERSHIP – A SECTOR THAT IS RELENTLESSLY OUTWARDLY FOCUSED, NOW CHALLENGED TO UP ITS GAME INTERNALLY TO MEET A DEMANDING FUTURE."

PEGGY MORRISON OUTON

INTRODUCTION TO WHAT NOW?

In the 1970s, a huge, new group of workers entered the workforce. These idealistic world-changers often had nonprofit intentions. Over the next four decades, the number of nonprofit organizations grew from 250,000 to 1.5 million (Hall, 2006; Salamon, 2012). This enormous generation of 75 million people came of age at a time when social justice issues came to the fore and hundreds of thousands of nonprofits were born to address those myriad concerns. In some cases, those organizations have grown from coffee houses in church basements serving runaways to multi-million dollar social service enterprises.

As funding has exponentially grown, so has the need for greater professionalism. These well-educated and long-tenured leaders have learned their craft and built their organizations. Those organizations were seldom built with attention to the individual needs of those who worked in them. Funding was focused on impact and results. This emphasis had an unintentional consequence of starving organizational development, often lacking in financial or human resource sophistication. The focus was on the community they served.

Now those same purpose-driven people are turning 65 at the rate of 10,000 a day (Boomers retire, 2010). For people who have spent little time thinking about themselves, questions of "what is retirement, how can I retire, will I truly retire or will my 'encore career' last until death?" are not easily answered.

While these decisions are personal and individual, the ramifications are profound for both the organizations they lead and serve and, most important, for the communities that depend on excellence in performance from their nonprofit partners.

"I DIDN'T LIKE LEARNING THAT I HAD A NEGATIVE NET WORTH, BUT I CAN WORK ON THAT!"

YOUNGER NONPROFIT PROFESSIONAL

For if these organizations have in many ways been casual in the treatment of their workforce, the next generations of leaders have also suffered from this lack of attention. Studies show that younger nonprofit professionals have little desire for the executive director job as it has previously been done (Johnson, 2009; McDonald, 2008). So the question before us is **What Now?**

In the late '90s, some attention was paid to the impending expected executive transitions coming for nonprofits. The economic boom of the Clinton years gave many nonprofit executives confidence that the performance of their 401(k)s would allow for a comfortable endgame and some began planning their exit. Studies were done, specialty consultants began to practice, and then came 9/11 and the resulting economic tumult. Still, the national conversation about executive transition continued until 2008.[1] When nest eggs were cracked for a second time in less than a decade, these conversations went largely silent and have not resumed. However, time is inexorable...throughout society, the aging of our leadership continues.

"OUR GRANTS MANAGER WAS TRAGICALLY KILLED IN A CAR WRECK IN THE SAME MONTH IN WHICH WE HAD 20 FINAL REPORTS DUE FOR FEDERAL GRANTS. I HAVE TWO GREAT YOUNG EMPLOYEES...EITHER OF WHICH MAY BE MY SUCCESSOR. NEITHER HAD THE WHOLE STORY ON HOW THESE GRANTS INTERTWINED. I GREW THE AGENCY FROM OUR FIRST GRANT...HOW CAN I DOWNLOAD ALL THESE IMPORTANT DETAILS SO THEY DON'T HAVE A MESS WHEN I AM GONE?"

OLDER NONPROFIT LEADER

Since 1999, The Bayer Center for Nonprofit Management at Robert Morris University has been an active partner to philanthropy and the nonprofit sector. Working with more than 3,000 nonprofits, we are up-close and personal on a daily basis with nonprofit leaders as they seek to meet ambitious missions and thrive in the face of great challenges. In this sector composed of thousands of small nonprofits, people matter profoundly.

1 Annie E. Casey Foundation studies included: Nonprofit Executive Leadership and Transitions Survey (2004); Capturing the Power of Leadership Change (2004); Interim Executive Directors (2005); Up Next (2005); Founder Transitions (2005); Stepping Up, Staying Engaged (2006); Building Leadership Organizations (2008); Read to Lead (2008); Next Shift (2008).

BoardSource publications included: Chief Executive Succession Planning (2002); Chief Executive Transition: How to Hire and Support a Nonprofit CEO (2008); Moving Beyond Founder's Syndrome (2008)

Tierney, T. J. (2006). The nonprofit sector's leadership deficit. *The Bridgespan Group*.

> **"WHO IS GOING TO TELL YOU WHEN YOU'RE LOSING YOUR FASTBALL?"**
>
> OLDER NONPROFIT LEADER

These issues of individual retirement choices reverberating through the community is one we began to explore in depth in our project, *74%: Exploring the Lives of Women in Nonprofits*. It was through that work that we saw the perils of inadequate human resources management (HR).

We see a sector that seldom calls the hiring process talent acquisition, a sector that too infrequently grows its own into leadership – a sector that is relentlessly outwardly focused, now challenged to up its game internally to meet a demanding future.

> **"SO, LET'S SEE...AFTER RETIREMENT, I'LL BE OLD, FAT, BLACK AND BROKE IN AMERICA BECAUSE I'VE WORKED THESE BRAND Z JOBS IN NONPROFITS ALL MY LIFE!"**
>
> 74%: EXPLORING THE LIVES OF WOMEN IN NONPROFITS INTERVIEW

We have been exploring these issues in a variety of ways. Since 2002, we have conducted a bi-annual Wage and Benefit Survey. This is a record of nonprofit employment practices that provides depth to our thinking. Most recently, we have also conducted a survey with nearly 300 respondents, both executives and other professionals, to measure organizational retirement preparedness in concrete terms (how much money do you have saved for retirement?) and in practice (does your board have a personnel committee?).

Because Pittsburgh enjoys tremendous private foundation wealth and because funding requirements have significantly changed nonprofit management practices – most notably in financial management, we also did eleven interviews with foundation leaders who collectively steward $6 billion dollars. The Pittsburgh region is #1 in local per capita giving in the nation (Giving in Pittsburgh, 2015). The perceptions and practices of these institutions provide a lever for change.

Through these several methods of research and from decades of experience working in the nonprofit sector, urgent questions arise.

1. Nonprofit organizations have insufficient human resource management. Since 2002, the BCNM Wage and Benefit Survey has highlighted a lack of attention to critical human resource management practice. In the most recent iteration of the survey (2017), only 6% of executives reported an intention to retire within the next five years, although 12% reported their age as over 65. In the study conducted for this report, 68% reported having a personnel committee of the board, but only 34% have a succession plan in place.

   How are we going to equip organizations to better address these challenges?

2. The amount of retirement savings is alarmingly low throughout society. However, there is a positive correlation between preparation for retirement and level of educational attainment (Annual Transamerica Retirement Survey, 2015). Nonprofit professionals are demonstrably well educated. Based on the findings from our most recent Wage and Benefit Survey (2017), 67% of executives reported possessing an advanced degree compared to 11% of the general public (U.S. Census, 2015). Yet their higher educational attainment and long tenure does not translate into greater retirement security. In fact, a recent Fidelity Investments study shows that nonprofit professionals with similar salaries to those in the private sector have on average 23% less saved in employer sponsored retirement accounts (Panepento, 2007). Other studies indicate much longer job tenure in nonprofits over for-profits (Bureau of Labor Statistics, 2016; Wage and Benefit Survey, 2017). Nonprofit people came – and stay! – for the cause.

   How can we foster programs, services, and policies to help create a better future for those who have served so faithfully?

3. Boards of directors and the funding community are best equipped to change these situations. Their practices and actions are central to a more productive future. While they are always working as partners to nonprofit staff, they have both the distance and the responsibility to insist on change that protects society from the individual choices made by nonprofit workers. The unequaled investment made in local nonprofits by local philanthropies is buttressed by the deep connection that these leaders have to the agencies and their leadership. In many cases, nonprofits in Pittsburgh have a first name and it is the executive's name.

   How can we use this warmth of relationship and deep community knowledge to better address the challenges of massive changes in leadership?

We are indebted to our colleagues featured throughout this publication and invite you to explore the images of their older and younger selves with portraits by Pulitzer Prize-winning photographer Martha Rial.

The body of the report provides more specificity and raises additional challenges. We will explore these issues both from the individual and the organizational perspectives. In the final section, we will recommend some next steps we can work on together.

These recommendations grew from conversations with funders and from our own experience at the Bayer Center working with our nonprofit clients and allies. They include: a more organized and community-wide approach to assure productive executive transitions, intentional tapping of the wisdom and experiences of the exiting leaders as part-time employees, consultants and community resources, increased financial sophistication for individuals and organizations, more deliberate and useful professional development for younger professionals.

A classic question asked of individuals considering their own future in retirement is "Do you see a cliff or a series of pathways?" We offer this work in an effort to move our beloved nonprofit community away from the cliff and onto a productive series of pathways.

Peggy Morrison Outon,
At the start of her career with daughter Katie – then one day old and now a practicing attorney in Pittsburgh.

Peggy Morrison Outon

PEGGY MORRISON OUTON

Executive Director,
Bayer Center for Nonprofit Management
at Robert Morris University

Turn the page for survey results from Carrie Tancraitor, Ph.D., and Jason Draper, Robert Morris University.

William "Bill" E. Strickland,
Founder, President and CEO,
Manchester Bidwell Corporation.
Inset: At the Three Rivers Arts Festival.

WHAT NOW? SURVEY RESULTS

Carrie Tancraitor, Ph.D., principal researcher

299 Participants

Representing

195 Identified Organizations

Survey respondents were:

- Nonprofit executives (50%)
- Nonprofit professionals (50%)
- Female (72%)
- Caucasian (89%)
- Median ages of:
  - – 57 years old for executives
  - – 46 years old for professionals

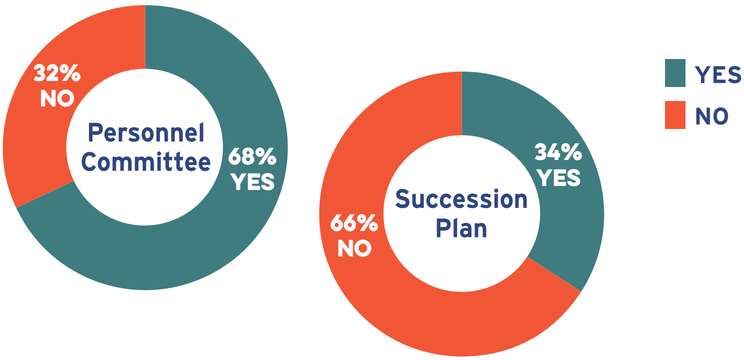
The median budget size was $1,635,798; however, budget sizes ranged from $21,000 to $186,000,000.

The median number of staff employed by an organization was 29, yet staff ranged from zero to 27,000.

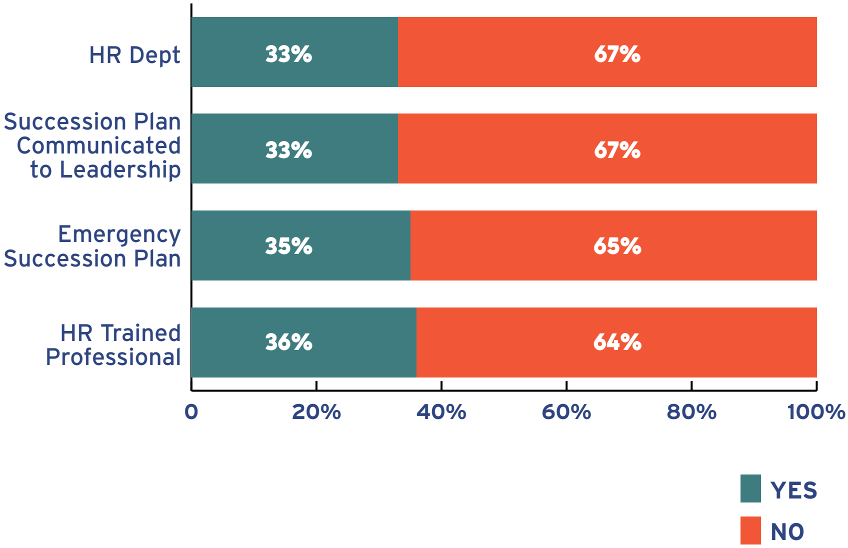
Nonprofit organizations lack readiness for massive retirements because of weak human resources practices.

Throughout the Bayer Center's history of applied research on the regional nonprofit sector, one of the biggest truths to emerge is the lack of effective, proactive human resource (HR) practices and systems in most agencies. This is true because nonprofit organizations work toward an ambitious mission, often with few staff and limited budgets. For instance, 75% of nonprofit organizations have annual revenues below $500,000 (Wing, Pollack, & Blackwood, 2008). As a result, it is difficult for executives to find adequate time and funds to devote to human resources.

Findings from the What Now? study further validate this notion. Regional nonprofit organizations are not ready for the massive wave of impending executive retirements. **Most nonprofits do not have a formal succession plan**. Of the 143 nonprofit executive respondents, only 34.3% (N = 49) indicated that their organization had a succession plan. Yet, 68.2% (N = 101) of executives reported that their board of directors had a personnel committee.

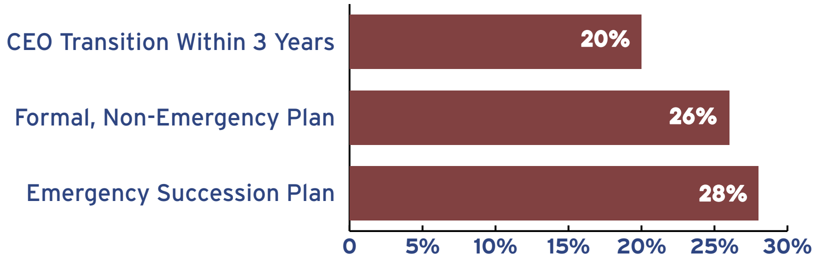


For most organizations, their **internal processes and systems to support retirement are spotty**. Around one-third of the responding organizations report having the necessary structures in place.



The Bayer Center's bi-annual Wage and Benefit Survey conducted in 2017 found a similar trend, where **less than one-third of the participating organizations reported having either a formal or an emergency succession.**

At the same time, 20% of participating organizations report an anticipated CEO transition within three years.



Source: 2017 Wage and Benefit Survey

Ineffective personnel committees

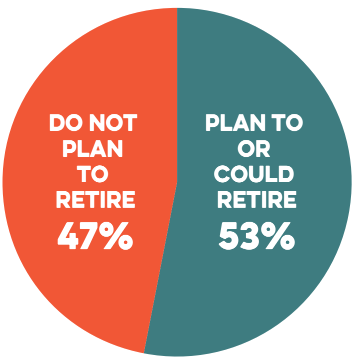
While 68% of What Now? survey participants indicated that their organization's board of directors has a personnel committee, the above data suggests these committees may not be fully fulfilling their charge. This is an unsettling trend given the sheer volume of impending retirements. In other words, many executive directors are planning to retire with limited succession planning in place.

The impending retirement boom

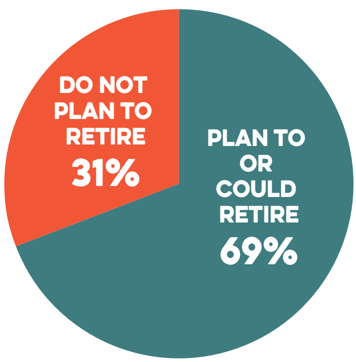
Based on the survey responses, it is clear that succession planning is inconsistent at best. Meanwhile, **it appears as though a sea change is going to happen within the next 10 years.**

According to the survey responses, **the median age of nonprofit employees was higher than the median age of all U.S. workers** (U.S. Bureau of Labor Statistics, 2014). A higher median age means a staggering volume of workforce that could potentially retire within the next 10 years. When considering the percentage of professionals who plan to retire within the next 10 years and the percentage who are uncertain, the quantity is considerable and impactful. For instance, over half (53%, N = 134) of the respondents could potentially retire in the next decade.

What is more concerning, the executives – as a result of their higher median age – represent a significant portion of the possible retirements. When combining the percentage of those who plan to retire (56%) with those who are uncertain (13%), **as many as 69% of executives may leave the sector within the next 10 years.**



PERCENT OF SAMPLE WHO COULD RETIRE



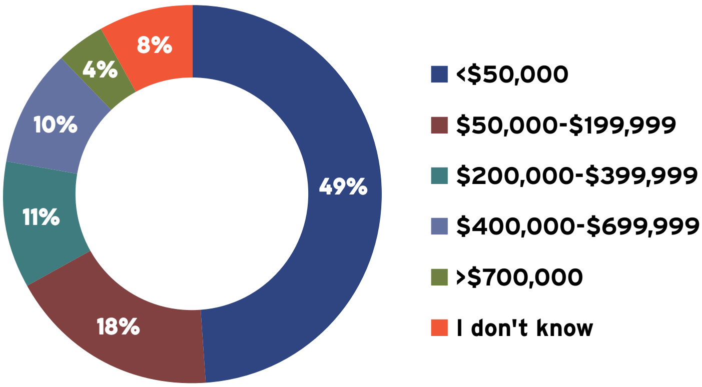
PERCENT OF EXECUTIVES WHO COULD RETIRE

Beverly Braverman,
Executive Director, Mountain Watershed Association,
along Indian Creek, Resh Park,
Indian Head.

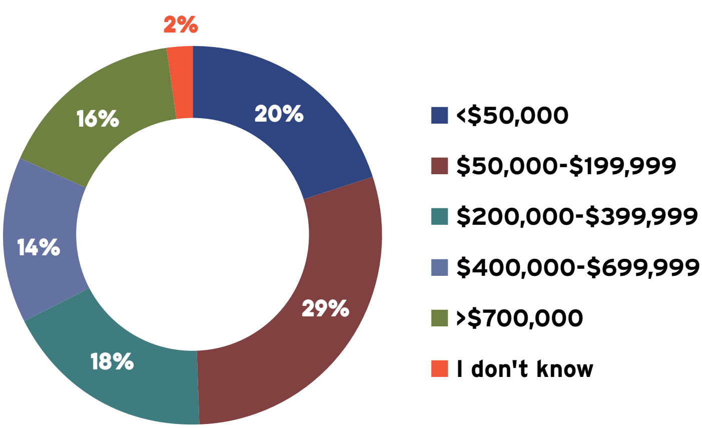
Inset: Martial arts practitioner/instructor.

Inadequate retirement savings

Unsurprisingly, many people do not have sufficient savings to carry them through retirement. Since nonprofit professionals have lower levels of total income, their retirement savings picture is less rosy. Nearly half (49%) of the nonprofit professionals report having $50,000 or less in retirement savings. This is a distressing finding when considering that over half of the sample was 46 years or older.



While executives have slightly more in their retirement savings, many are still financially unprepared. With half of the sample aged 57 and older, industry standards suggests at least half of this sample should have six times their annual salary saved for retirement (Elkins, 2017). The average annual compensation for an executive in this region is $114,000 (Wage and Benefit Survey, 2017), indicating many executives should be saving in the range of $650,000. Barely 30% are even near that rough target.

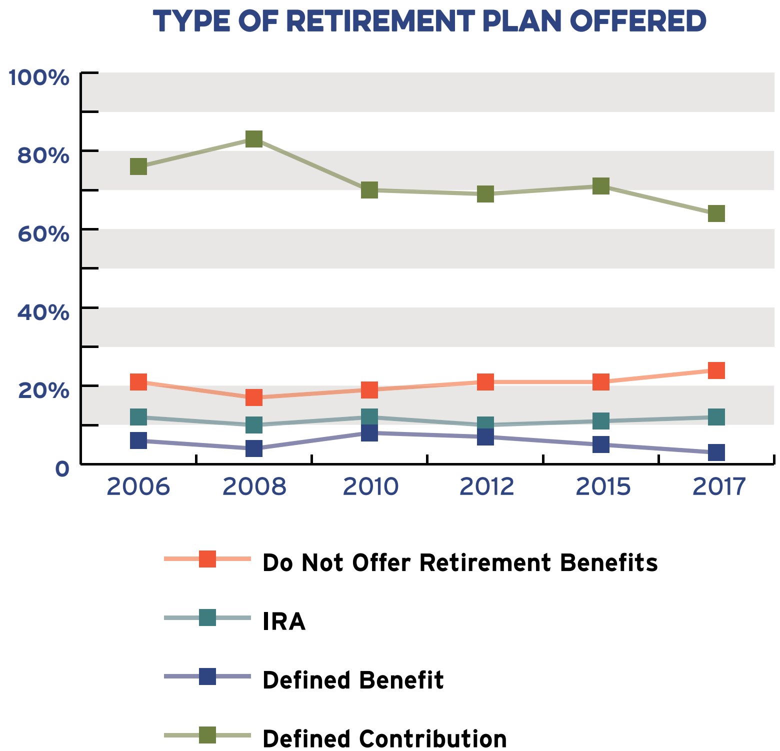


Retirement savings mechanisms are in decline

The fact that so many nonprofit professionals report being financially unprepared for retirement is somewhat predictable. At the same time people are living longer and healthier, retirement systems are changing. For instance, employer sponsored programs are no longer commonplace. As companies have cut pensions and retirement benefits, the burden of funding retirement must now be shouldered by individuals, who in many ways lack financial acumen ("New study reveals," 2013).

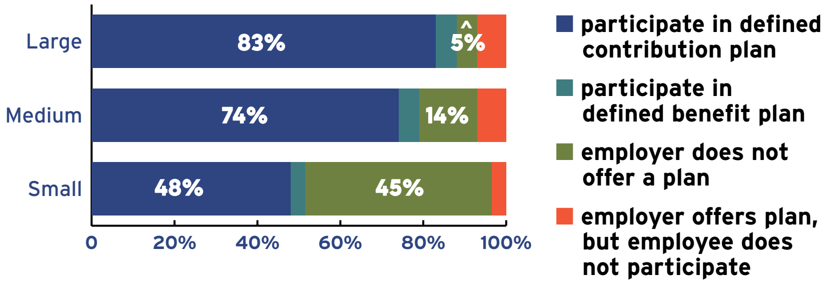
This trend of changing retirement systems has been evidenced in the Wage and Benefit Survey over the last 10 years. Most notably, there has been a steady downward trend in the percentage of organizations offering retirement benefits.

For those organizations that do offer retirement savings plans, the Wage and Benefit Survey found that defined contribution plans were the most popular employee sponsored savings mechanisms; however even that type of plan is becoming less prevalent.

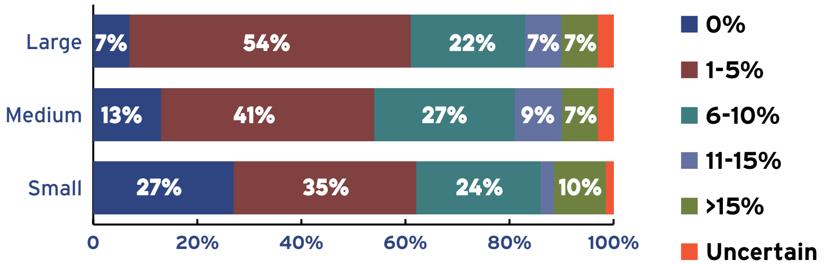


Source: 2006-2017 Wage and Benefit Surveys

This trend is particularly acute in small organizations. For instance, organizations with budgets less than $1 million offer employer-sponsored plans at lower rates than medium-sized (budgets between $1-5 million) and large organizations (budgets over $5 million). As aforementioned, small nonprofits comprise the largest portion of nonprofit organizations.



As a result of less access to employer sponsored retirement plans, individuals who work for smaller organizations contribute a lower percentage of their income to their retirement plans than their peers at medium or large organizations.



While the organization's budget size affected the percentage of income an individual contributed, other variables did not. For instance, there was no relationship between the percentage of income contributed to retirement savings and age. In other words, older individuals are not necessarily saving a larger portion of their salaries.

Conclusions from the data

The concept of retirement is changing as employees are working longer and often deferring retirement by changing their work patterns. Although the bubble of Baby Boomers has continued to slide, the inevitable burst will happen sooner rather than later. Unfortunately, the data suggests that organizations and individuals are unprepared.

Regional nonprofit organizations are plagued by inadequate human resource practices, ineffective personnel committees, and insufficient development of younger leaders. From an individual perspective, the data indicates emerging retirees will not be able to adequately support themselves after leaving the workforce.

Clearly, the crisis is not only at the top, but throughout the organization. Boards of directors, funders, and executives have much work to do.

HOW ARE WE GOING TO EQUIP ORGANIZATIONS TO BETTER ADDRESS THESE CHALLENGES?

John Dawes,
Executive Director, Foundation for Pennsylvania Watersheds at his Huntington County farm with Isabel, one of his Corgis.

WHAT NEXT?

What will the nonprofit sector look like in 2027? There is much agreement that it would likely be very different from today. Since the 1980s, there has been a lively dialogue about the right size of the sector. How many nonprofits is the right number? The number has grown and grown from 250,000 in the 70s to 1.5 million today – and more each month. Many feel impatience when confronted by the intractable and in some cases, worsening social ills. This frustration leads to constant scrutiny of effectiveness that seeks business models to produce it.

Consolidation of the sector is probable, especially in the human services where mergers and acquisitions are common. With government funding support continuing to erode and retirements freeing boards from making decisions based on loyalty to their individual executive, merged entities will continue to occur. In part, this may help solve the leadership gaps. Very small NPOs are far less affected by the vagaries of funding (they haven't had money to speak of...they often use volunteers as staff...their community is truly their bedrock) so they will not be competitive in this new environment.

There is nothing simple in this new equation of leadership, sustainability and effectiveness. Perhaps, the new hybrid values-driven business organizations may flourish with new models of leadership.

Because many younger people report that they do not want the executive director job! A generation that often places a high priority on work-life balance has closely observed work-stressed elders coping with governance and funding challenges, working long hours for low pay and now not able to retire. They have some understandable criticism of the way the sector is currently built. New models of agency leadership need to be explored.

ARE THERE BETTER WAYS TO STRUCTURE AGENCIES?

HOW CAN RESPONSIBILITY AND TASKS BE BETTER DIVIDED?

WHAT ARE THE IMPLICATIONS OF THESE CHANGES FOR ACCOUNTABILITY BY STAFF AND BOARD?

CAN THE SOCIAL JUSTICE SECTOR CREATE MORE JUSTICE WITHIN ITS OWN HOUSE THAT FURTHER ENABLES GREATER JUSTICE WITHOUT?

The Call for Serious Solutions

Those institutions that seek to build the capacity of vital nonprofit organizations need to take this sea change of leadership, of business models and of structure seriously. Serious challenges demand serious problem solving.

From these interviews and decades of work in capacity building, here are possibilities to address the challenges on the near horizon.

1. **Direct service help is needed for the exiting leaders.** The number one request of the executives who responded to our survey was for executive transition assistance. Currently, there is no focal point for finding interim directors to help boards and staffs better understand orderly transition. Policies of interim directors who work for the stabilization of the organization not to position themselves as the next leader are important to making the sector's transition more productive. Such interim leaders might be more open to merger and the loss of one executive position. They would have a different and powerful voice with the board. Boards would have trained and sturdy partners as they go through what may be for some the most challenging time of their board service.

2. **Tap the wisdom of the exiting leadership.** In a national study, "Daring to Lead", the vast majority of nonprofit leaders did not want to leave the sector after formal retirement. While it is seldom a good idea for the leader, especially long-tenured or founding executive to remain in the agency they built, they could provide guidance, relationship coaching and other practical strategies learned on the job as a part-time employee, running a program or keeping the books at another agency.

   The Bayer Center's Wage and Benefit Survey and other industry research documents a sector that employs fewer part-time employees than does business. Meaningful, fairly compensated part-time work for seasoned retired leaders should be encouraged. An employee "agency" that facilitates the process for agencies and individuals could open the marketplace and accelerate productive change.

3. Funders were thoughtful about and critical of current professional development efforts. There was a feeling that too many programs were not sufficiently specific or rooted in reality. There needs to be real thought given to program development for the next generation of leaders. **In addition to skill-building activities, a new style of more hands-on coaching driven by the changes in the workplace, the funding environment and the evolving cast of leadership characters needs to be developed and financially available to younger nonprofit leaders.**

4. **Continued efforts at greater financial sophistication for organizations and individuals are necessary.** The lack of knowledge and attention to financial reality is at the heart of the current situation. Using a model like the Executive Service Corps, former CFOs and other skilled individuals could provide custom financial management skills building to the new generation of leaders. Financial management professionals could be engaged as volunteers to assist nonprofit professionals in individual financial planning on an on-going and individual basis. These efforts should occur as early as possible in a person's career.

5. Nelson Mandela and Jimmy Carter and other very distinguished public servants formed The Elders ten years ago. This group has led a discussion about how the world, a decent and humane world, should work. They have written opinion pieces, staged actions, been interviewed by the world press. Admittedly, they are big names, but big names that recognized the power in affiliation and association to advance their aspirations for the world.

   The nonprofit world is in a perilous place. The significant loss of leadership is threatening. **Could there be a group of senior community leaders who meet, discuss, share their experiences, write Op-Eds and seek deliberately to influence the thinking of new decision makers and makers of public policy?**

   This group would draw upon the most prestigious names in nonprofits…foundation leaders, senior nonprofit executives, people who had given their whole lives in service to their community…that are now freed from the responsibility of leadership in one organization to give voice to truth and seek justice. **Isn't that the place that many Boomers started? Isn't this the time that demands their continued courage and vision and voice?**

The future is always bright, always perilous, always unknown. The nonprofit sector has been characterized by resourcefulness, by the power and beauty of dreams for the greater good. Those who have led and those now leading and those yet to lead must be heard. The responsibility of the sector that is not business, not government, but is mutual benefit, is the social sector, must endure, must continue to serve with intelligence and passion and protect the lives of the vulnerable. This is consequential work. We must pass the torch with care.

PEGGY MORRISON OUTON

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Special thanks to:

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Diana Bucco, Buhl Foundation

Maxwell King, The Pittsburgh Foundation

Sylvia Fields, Eden Hall Foundation

Mark Lewis, POISE Foundation

Grant Oliphant & Wayne Jones, The Heinz Endowments

PUBLICATIONS AND PUBLIC RELATIONS
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Photographs © Martha Rial 2017

Lucille “Luci” E. Dabney,
Executive Director, Program to Aid Citizen Enterprise (PACE).

Inset: Early in her career.

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New study reveals workers around the world are unprepared for retirement (Rep.). (2013, May 14). Retrieved from Transamerica Center for Retirement Studies: http://www.businesswire.com/news/home/20130513006659/en/Study-Reveals-Workers-World-Unprepared-Retirement

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Maxwell King,
President and CEO,
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Inset: The Philadelphia Inquirer editor celebrates a Pulitzer Prize with staff.

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Shirl Regan,
Executive Director, Women's Center and Shelter of Greater Pittsburgh.

Inset: Beaver Falls High School.

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