

The Bayer Center for Nonprofit Management
at Robert Morris University

Fall 2009 Courses

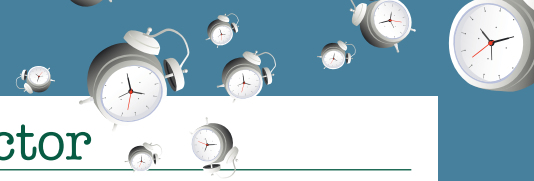
“These are the times in which
a genius would wish to live.
Great necessities call out
great virtues.”

Abigail Adams



NONPROFITS BUILD STRONG COMMUNITIES...

WE BUILD STRONG NONPROFITS



Letter from the Executive Director

Beloveds,

One of my SHE-roes in life is Molly Ivins who always called her readers Beloveds and in these times of fear of loss of many things for our community, of hard work under great duress and stress over resources that fail to come – and in celebration of my tenth anniversary working with the fine people of Pittsburgh nonprofits and with a nod to my southern roots – I say again – Beloveds...

Indeed these are times in which a genius would wish to live. They are also times that are calling us to possess great measures of resilience and grace...

Over this mild, cool summer, Pittsburghers saw some marvels. Kayaks on Lake Elizabeth and everywhere we looked... intriguing plays about art and deception in a garden on Washington's Landing... Andrew McCutchen running the bases like the wind and fireworks blasting off...

One of the most striking was the man who walked high above the Allegheny River on a cable the width of a nickel. They didn't supply the cable he had requested. This one was more slippery. And to boot, it was sprinkling rain that day. But he had promised and a lot of people were watching. And so he took off his shoes and walked that broad expanse of river in his socks – without a net. His wife watched from below and we all held our breath.

Is this not a metaphor for how it is to work in the nonprofit sector these days? Are you not being called to exhibit great confidence in the face of real struggles and challenge to provide the vegetables, the theater, the books, the methadone – the service and help for which you have given your life? The courage and confidence shown by the aerialist comes from a lifetime of work and belief he can do it. Many in our sector are digging deeply into their reserves of skill and previous experience of making it through...one more time.

I love the Paul Simon song, "The Boxer"... "and he carries a reminder of every glove that laid him down or touched him 'til he cried out...". I see my friends carrying those reminders these days and my heart aches for them. But many nonprofit leaders have indeed been here before – and before- and before. Sometimes, I feel I have should have my clothes embroidered – "Cutting arts funding limits innovation"... "Assuring a decent life for all assures safety and security for us all"... "Libraries need to be open"...

But the other side of this is a song of those who have come through. There are many among us who know how to protect what they love. They are adept at making hard choices and keep their eye on what's important. They live to fight another day. And they do it because they also know to take care of themselves. They know to seek comfort from each other. They know to share ideas, resources and confidence. But back to Miss Molly...

"So keep on fightin' for freedom and justice, beloveds, but don't forget to have fun doin' it. Be outrageous, ridicule the fraidy-cats, rejoice in all the oddities that freedom can produce. And when you get through kickin' ass and celebratin' the sheer joy of a good fight, be sure to tell those who come after, how much fun it was!"

From her lips to your ears... buy some school supplies and have a great fall – and come see us at the Bayer Center!

Peggy Morrison Outon, Executive Director

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Icons

Throughout this catalog, you'll find various icons. These icons point you to the courses you've told us you need, and they'll help you plan your fall semester at the Bayer Center.

They include:

- ◆ Assuring Quality/Impact/Outcomes
- ✚ Clinics
- ◆ Fund Development
- ★ Human Resources
- ⊗ Marketing

The Bayer Center for Nonprofit Management

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, 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 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 frontline 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 ten years of service to the nonprofit community, the Bayer Center has completed over 700 consulting engagements and educated over 2,000 students. Our consulting clients include human service, 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
- > Heightened brand awareness
- > 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
- > 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.*



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 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
- > Researching and performing environmental scans that clarify the organization's position within its service and competitive landscape
- > Creating fund development plans that reflect donor realities
- > Recommending and exploring opportunities for partnerships and collaborations

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

Featured Series

Creating Solutions for Tumultuous Times, the Sequel

The economy is starting to show signs of life, but the road for nonprofits is still full of bumps. Continuing with the theme of our popular featured program from last spring, we are offering a new series of discussions for tumultuous times. On three successive Fridays in October, the Bayer Center will bring in some of our best friends from within and outside the sector to talk about their view of what's ahead and how you can best position yourself for support and assistance. Join us to talk about:

Working with our Foundation Allies • Working with our Corporate Allies • Working with our Government Allies

Take individual classes, or sign up for the whole series at a discounted price. Come listen, ask questions, and hold meaningful conversations with some of your most important partners. Last spring's attendees were enthusiastic about the value of this program!

❖ Working with our Foundation Allies

Friday, Oct. 16 from 9–11 a.m.

Generous gifts from foundations have often secured the future for regional nonprofits. In this time of financial turmoil, foundation leaders are challenged to use their more constrained resources for the greatest good. Come reflect with three of our region's most thoughtful foundation leaders about how they make those decisions.

Instructors: Peggy Morrison Outon, Bayer Center; Hank Beukema, McCune Foundation; Bob Vagt, The Heinz Endowments; Dee Delaney, Fisa Foundation

Fee: \$40 (\$30 if paid by Oct. 9, \$75 for the entire 3-part series)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

❖ Working with our Corporate Allies

Friday, Oct. 23 from 9–11 a.m.

We're not the only ones struggling; times are tough for our corporate allies, too. This session will explore what corporations really want (from us). Come talk about the prospects for corporate giving, how to make your organization the most likely recipient of corporate philanthropy, and ways that nonprofits and corporations can work together beyond just money.

Instructors: Peggy Morrison Outon and Scott Leff, Bayer Center; Lenora Visio, Clarity Strategic Consulting; Deborah A. Moses, Fifth Third Bank

Fee: \$40 (\$30 if paid by Oct. 16, \$75 for the entire 3-part series)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

❖ Working with our Government Allies

Friday, Oct. 30 from 9–11 a.m.

Is it our turn now? Is there bail-out money for us? What are the prospects for government funding of nonprofits? Hear from two influential legislators about what Pennsylvania's budget shortfall may mean for you now and in the future.

Instructors: Peggy Morrison Outon, Bayer Center; Senator John Pippy; Representative Jake Wheatley

Fee: \$40 (\$30 if paid by Oct. 23, \$75 for the entire 3-part series)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

❖ Developing Logic Models for Program Planning and Evaluation

Wednesday, Sept. 16 from 9 a.m.–4 p.m.

Logic models are the gold standard of program development and service evaluation among nonprofits and their funders. How do you know that you're meeting your goals? Are you sure you're reaching the right constituents? In the morning session, you'll learn to create a logic model for your program that helps you plan and evaluate, and provides your funders with the information they want, too. In the afternoon, learn how to work with indicators and develop a data collection plan to get the best information about how well your model is working and where it may need improvement.

Instructors: Maria Zeglen Townsend, Ph.D., Townsend Associates LLC; Sheila Bell, Allegheny County Department of Human Services

Fee: \$125 (\$115 if paid by Sept. 9)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

❖ Get Your Stories Straight: * Tagline, Elevator Speech, 15 Minute Story, Half-hour Presentation

Tuesday, Sept. 29 from 9 a.m.–noon

Arm yourself and your staff with the material that will come in handy when it's time to introduce people to your mission and story. This workshop will help you craft your tagline, your one-sentence overview, an emblematic story you can tell in 15 minutes and a more detailed half-hour presentation. Learn how to keep all four lively and make sure your audience remembers what you want them to remember.

Instructor: Jeff Forster, Bayer Center

Fee: \$65 (\$55 if paid by Sept. 22), OR

Combine this class with "PowerPoint Visuals That Work" (p. 13) for \$90 (\$80 if paid by Sept. 22)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

❖ Learning to Work Together – Development Director, Executive Director and Board

Wednesday, Oct. 7 from 9 a.m.–noon

Successful fundraising requires a team approach. The Development Director, Executive Director and board members all play a critical role in raising funds for their organization. Unfortunately, those roles and responsibilities aren't always clearly defined or well-communicated, causing frustration and results below potential, especially when a new Development Director is hired. This session, designed for both staff and board members, will focus on defining roles, managing expectations, and how to address reluctant fundraisers. You will leave this class ready to create a culture of fundraising within your organization that will enable you to raise the funds needed to carry out your mission.

Instructor: Maureen Mahoney Hill, CFRE

Fee: \$65 (\$55 if paid by Oct. 30)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

❖ Proposals that Get the Grant

Thursday, Oct. 22 from 9 a.m.–noon

Take that great idea and get it funded! But how? This class explores the indispensable principles of writing winning proposals:

- > Develop a strategic approach to funders
- > Identify what you need to know before you start writing
- > Learn the basic elements of successful proposals
- > Understand what you need to communicate

Instructor: Teresa Gregory, Robert Morris University

Fee: \$65 (\$55 if paid by Oct. 15)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610



❖ Ask! The Essential Fundraising Skill

Wednesdays, Nov. 4, 11, 18 from 4–7 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 three-part series you’ll learn how to ask for the gift, with an emphasis on face-to-face appeals to foundation officers, corporation representatives and individuals.

Instructor: Dave Brewton, East Liberty Family Health Care Center

Fee: \$180 (\$165 if paid by Oct.28)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

🌀 Writing Press Releases that People Will Actually Read

Monday, Nov. 16 from 1–4 p.m.

The press release is the building block of effective media relations, and it is becoming more important with the rise of digital media and online social networking. In this class you will learn to write compelling press releases that will help you generate positive media coverage and communicate directly with the public through your website and other online channels. We will talk about the most effective ways to distribute your news release and how to maximize its impact.

Instructor: Jonathan Potts, Robert Morris University

Fee: \$65 (\$55 if paid by Nov. 9)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

★ Volunteers: Recruitment, Retention and Recognition

Friday, Dec. 4 from 9–11 a.m.

Volunteers are a key part of our “nonprofit-ness,” and yet the pressures of ever-increasing professionalism have pushed volunteer solutions to the margins in many organizations. Join us for a practical discussion by three of our region’s leaders on effectively using volunteers to deliver programs and leverage resources, both human and financial.

Instructors: Peggy Morrison Outon, Bayer Center; Alyssa Dolney, Greater Pittsburgh Community Food Bank; Sarah Hardin, Carnegie Science Center; Lynn McGuire-Olzak, Western PA Conservancy

Fee: \$40 (\$30 if paid by Nov. 27)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

★ Creating a Successful Internship Program

Wednesday, Dec. 9 from 1–4 p.m.

Hosting an intern offers your company a low risk, cost effective way to test-drive potential employees so that you can find the best fit for your company. In this interactive workshop, learn how to create a successful internship experience for the intern and the company!

Session will cover:

- > How to create a win/win for your organization
- > How to write the most effective position description
- > Understanding the kind of talent your organization needs to be successful in achieving its goals

Instructor: Regina Anderson, Coro Center for Civic Leadership

Fee: \$65 (\$55 if paid by Dec. 2)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

Managing Stress and Increasing Productivity

Thursday, Dec. 17 from 9 a.m.–noon

Holidays can be some of the most stressful times for community-based caregivers. The needs of the people we serve seem to become more acute, in addition to the holiday activities at the work place and in our private lives. Instead of a joyous time, caregivers often dread the holidays.

In the first section of the workshop, we will describe the symptoms of chronic work-related stress that can lead to a poor quality of care for clients and poor quality of life for the caregiver, and offer ideas and strategies for individuals to help restore and renew. Then, learn to relax and rejuvenate with a yoga session that will teach you techniques you can do right in your office.

Instructors: Dave and Sue Stewart, The Caregivers Institute; Katrina Woodworth, Hatha Yoga Instructor

Fee: \$65 (\$55 if paid by Dec. 8)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

❖ Pinpoint Planning Clinic

60-minute sessions available by appointment

Tired of spending too much time and precious resources trying to figure out how best to improve your nonprofit? Consider using PinPoint Planning™, a tailored and time-limited approach that provides quick analysis of critical operations in the following areas:

- > Finances and Financial Management
- > Fundraising
- > Human Resources
- > Legal Issues
- > Governance
- > Technology

Each PinPoint Planning™ tool is a type of audit that will take organizations about an hour to complete. It provides executives and boards with concrete information about practice gaps so that their organization can focus its resources on specific areas needing improvement instead of a complete overhaul.

Organizations receive an internal assessment to complete and return. Then the Bayer Center will assign an ESC volunteer professional from the relevant field to review your materials and meet with you for a working session. After your face-to-face meeting, you'll receive a report containing a number of 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.

ESC Volunteers: John Eichenlaub; Bob Moll; Ray Frankoski; Dan Boyd; Harry Goern; Jack Owen

Fee: \$50

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

Our Clients Speak . . .

The YWCA Board was sure we were doing things right in our organization, but we weren't sure that we were doing the right things. When we engaged the Bayer Center to assist us with our strategic planning process, we were very specific about our goals. We wanted a *practical* strategic plan. We wanted an *analysis* of our existing programs and status in the community. We wanted the agreed upon goals and objectives to be tied very directly to available *resources*. We wanted the plan to include a method by which we could *evaluate* our efforts. And we wanted all that at a price that was more than *reasonable* and fit our limited budget. The Bayer Center staff *listened*. More than 15 meetings and dozens of emails and phone calls later, we have a strategic plan that meets *all* of our expectations.

YWCA of Westmoreland County
Bonnie Lewis, Executive Director





Governance

Your organization deserves nothing less than dynamic governance. The surest road to success is an engaged Board working in collaborative partnership with a trusted Executive Director. The Bayer Center advises, teaches, and consults on basic Board functions like fiduciary responsibility, Conflict of Interest policies, and Board members' roles in fundraising. We also go beyond the nitty-gritty to help you build Board commitment, ensure the right mix of Board membership, and get your committees functioning the way they should.

And if it happens that you don't have a good working relationship between your Board and E.D., might we suggest that the first thing on your plate should be making sure you have a good Succession Plan in place? By the way, we do that, too.

Some of the ways we assist organizations are:

- > Educating Boards in best practices and state-of-the-art thinking about roles and responsibilities
- > Clarifying officer and committee structures and responsibilities
- > Integrating Boards into organizational fundraising
- > Assessing Board make-up and assisting in recruitment strategy
- > Providing tools, forms, and templates
- > Getting Board members excited about their organizations

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

She-oes Brown Bag Lunch Conversations

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

During SHE-oes brown bag lunches, we will continue our conversation on the lives of the women who represent 75 percent of the workforce in nonprofit organizations. Come and bring your lunch as we address issues of equity and how we can fully develop the potential of women seeking to meet the needs of our community. This facilitated conversation's agenda will be set by those who participate.

Fee: Free, but please R.S.V.P.

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

★ Managing Conflict

Thursday, Oct. 15 from 9 a.m.–noon

Conflicts occur every day. The nature of conflict is that it escalates unless we find constructive ways to deal with it. This workshop will provide skills for managing and de-escalating conflict in the workplace and one's personal life by helping participants to:

- > Increase the options they have for preparing themselves to better deal with conflict
- > Understand conflict dynamics and apply them to determine effective and ineffective strategies
- > Develop an awareness of personal attitudes and styles in dealing with conflict
- > Practice communication skills that help to prevent and de-escalate conflict

Instructor: Ellen J. DeBenedetti, Mediation Education & Training

Fee: \$65 (\$55 if paid by Oct. 8)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

★ **Healing the Wounds:
How to Consider Layoffs and Survive**

Tuesday, Oct. 20 from 9 a.m.–noon

In a difficult economic climate, most organizations have found it necessary to reduce expenses and services...which often means laying off employees. This action is painful for any organization, but, in the case of nonprofits, there is even greater pain as employees are often seen as “family members” who work for lower pay because of their passion and dedication to the cause. This session will explore alternatives to layoffs, the best practices to follow if they are necessary, and tips for helping the survivors and the people who manage them to heal so they can keep the organization healthy.

Instructor: Phyllis Hartman, PGHR Consulting

Fee: \$65 (\$55 if paid by Oct. 13)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

★ **Nonprofit Supervisors:
Problem Solving Workshop**

Tuesday, Oct. 27 from 1–4 p.m.

This workshop allows nonprofit supervisors to share experiences and solutions to challenging interpersonal relationships, and build additional skills in human resource management effectiveness. By evaluating and discussing real-life case studies, we will help you gain tools for building teamwork among your staff, improving communication skills, dealing with conflict, motivating staff toward a common goal, giving good feedback and other common issues that supervisors face.

Instructor: Alan James, ESC

Fee: \$65 (\$55 if paid by Oct. 20)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

**Recruiting and Retaining the
Peak-Performing Board**

Wednesday, Nov. 18 from 9 a.m.–noon

Where do eager, energetic and enthusiastic board members come from? How do you locate, interest and engage them? Attend this lively, interactive session and learn how to build and constantly nurture a passionately committed, highly effective and thoroughly engaged board of directors. By the conclusion of the workshop attendees will learn how to:

- > Embed YOUR board with the characteristics of peak-performing boards
- > Create, sustain and constantly improve a passionately committed, highly effective and thoroughly engaged board
- > Find and recruit eager, energetic and enthusiastic prospective board members
- > Create an effective continuing education program for your board, and
- > Much, MUCH more

Instructors: Michael Kumer and Allison Jones, The Nonprofit Leadership Institute at Duquesne University

Fee: \$65 (\$55 if paid by Nov. 11)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

**Planning for Right Now:
Thinking Ahead When It's Hard to Anticipate**

Tuesday, Dec. 1 from 9 a.m.–noon

This class will present the principles of effective planning. Even in turbulent times, it's important that organizations have high quality, focused and comprehensive conversations about their future. By using pertinent questions and planning frameworks, participants will be able to understand how to conduct a comprehensive plan. Those who have a plan that may now feel out of date because of all the changes in the economy can learn some key questions to refresh their plan. And for those who lack the time to do a comprehensive plan, this session will discuss how to select key questions for examination. Anticipation is a hallmark of effective leadership. Bring your plans to class!

Instructor: Peggy Morrison Outon, Bayer Center

Fee: \$65 (\$55 if paid by Nov. 24)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610



The Governing Board and the Board Chair

Wednesday, Dec. 2 from 1–4 p.m.

Do you know how to get the best from your board? It can be an executive director's most daunting task. We will present principles of effective board leadership and discuss the critical relationship between the board chair and executive director. Talk about this issue with your peers, find out how the most effective boards operate, and learn basic processes to ensure sound governance.

Instructor: Doreen Boyce, Buhl Foundation (retired)

Fee: \$65 (\$55 if paid by Nov. 25)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

✚ Ask an Attorney Clinic

60-minute sessions available by appointment

Do you understand all of the terms in your lease? What does your insurance policy really cover? Are your personnel practices a lawsuit waiting to happen?

Take advantage of affordable, one-hour consultations at LawLinks' Ask an Attorney clinics. Meet one-on-one with an attorney and discuss legal issues that concern you, like:

- > Confusing "legalese" and contract terms
- > Employment law and whether your organization's policies and procedures are compliant
- > Protecting your organization against lawsuits
- > Trademark and copyright protection

Instructor: Varies

Fee: \$50

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

✚ HR Clinic

★ 60-minute sessions available by appointment

Do your HR policies need updating? Is expansion requiring more staff, more new job descriptions and more care in treating everyone fairly? Maybe you're facing layoffs or have a pregnant staffer and no maternity policy. We 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 HR materials – including employee handbook, performance appraisal form and anything else HR-related – to your appointment.

Instructor: Ray Frankoski, ESC Volunteer

Fee: \$50

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

Our Clients Speak . . .

The Kingsley Association was founded as a settlement house in 1893. Over the course of its 115 year history, Kingsley has been constantly challenged to remain relevant in the lives of those who live in the neighborhoods we serve. The staff of The Bayer Center worked with the staff and Board of Managers to develop a strategic plan that outlined the way forward for the organization. In the process, the Bayer staff helped to facilitate honest and frank discussions among our leadership that enabled the kind of tough decision making that energized everyone involved. As a result, Kingsley has significantly strengthened its capacity to address the ever-changing needs of the families and communities we serve.

The Kingsley Association
Malik G. Bankston, Executive Director



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 3-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**.

❖ **Planned Giving: The Basics**

Wednesday, Oct. 14 from 9 a.m.–noon

Fundraisers are often paralyzed by fear of the technical and legal details of planned gifts and leery of talking to donors about a gift that involves their death. This session offers simple ways to incorporate planned giving into your fundraising program immediately. Learn why planned giving is important for every development program and how planned giving can improve donor relationships and increase dollars raised – even during tough economic times. Participants will leave this session armed with the information and inspiration to convince themselves, as well as their boss and board, that they are ready to start. A useful follow up to this class is “Planned Giving: Beyond the Basics.”

Instructor: Maureen Mahoney Hill, CFRE

Fee: \$65 (\$55 if paid by Oct. 7)

\$90 (\$80 if paid by Oct. 7) for both classes

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

❖ **Planned Giving: Beyond the Basics**

Wednesday, Oct. 21 from 9 a.m.–noon

Are you and your Board ready to move beyond bequests? In this session we'll explore more complex types of planned gifts including charitable gift annuities and charitable trusts, and we'll learn how partnering with allied professionals in the community can expand your planned giving program. We'll dig into your donor base to identify potential planned giving donors and learn to match particular gift options with the needs of your donors. This course is designed as a companion course to the session, “Planned Giving: The Basics.”

Instructor: Maureen Mahoney Hill, CFRE

Fee: \$65 (\$55 if paid by Oct. 14)

\$90 (\$80 if paid by Oct. 7) for both classes

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

Our Clients Speak . . .

Catholic Charities has a very engaged and active Finance Committee of the Board of Directors. They meet regularly and receive very detailed financial information. However, the Committee had been asking for a more concise and user-friendly one-page reporting tool for the Board. The Bayer Center consultants came to us and met with our Finance Committee to develop a comprehensive reporting tool that helps to more easily identify areas of strength and concern. We are grateful for their superior customer service and expertise.

Catholic Charities of the Diocese of Pittsburgh
Susan Rauscher, Executive Director

How to Manage Your Cash...

Friday, Nov.13 from 9 a.m.–noon

Discover the most effective approach to forecasting your annual cash inflows/outflows and what financial information to include. We will walk through creating a cash flow projection, work through in-class examples, and discuss why planning for cash flow is essential to running a healthy organization. This class is designed for staff accountants, senior management, and board members. So, bring your organization's budget, a calculator and pencil for this interactive session on creating a tool that will strengthen your organization.

Participants are encouraged to take the follow-up class, "...and What to Do with It."

Instructors: Scott Leff and Garrett Cooper, Bayer Center

Fee: \$65 (\$55 if paid by Nov. 6)
\$80 (\$70 if paid by Nov. 6) for both classes

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

...and What to Do with It

Friday, Nov. 20 from 9 a.m.–10:30 a.m.

Now that you can anticipate your cash inflows/outflows, let us show you the most prudent ways to protect and grow those new reserves you're building up. Our expert panel will identify various investment products, discuss risks and returns associated, and share information on cash management best practices. This is one class you can't afford to miss!

Though not a prerequisite, participants are encouraged to take "How to Manage Cash..." prior to taking this course.

Instructors: Scott Leff and Garrett Cooper, Bayer Center; Thomas R. Moore, Greycourt & Co.; Mark D. Sullivan, First National Bank

Fee: \$25 (\$20 if paid by Nov. 13)
\$80 (\$70 if paid by Nov. 6) for both classes

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

Financial Wellne\$\$ Package

You asked, and we listened. How do you know the right level of cash reserves? How can you create financial reports that are efficient, understandable, and help your board members focus on what's important for them? Is your financial model sustainable?

The Bayer Center has looked at all of these issues and more to come up with a Financial Wellness Package for management and governance. A full package will provide your nonprofit with any or all of:

- > A financial assessment that looks at key indicators and evaluates whether you are at financial risk
- > An analysis of financial performance that compares current performance with trends over time
- > A customized benchmarking study using the Bayer Center's database of over 240,000 organizations to compare you to any grouping of other nonprofits based on size, type and location and give you the information you need to finally set meaningful and realistic financial goals
- > A colorful and simple Financial Dashboard built around the questions that are important to you so management and board members can assess financial performance at a glance
- > A set of targeted questions to help board members identify the information they need to oversee financial performance
- > A presentation and training for the board to use and understand the financial assessment and the Wellness Package tools

Contact the Bayer Center's Associate Director, Scott Leff, at **412-397-6006** to set up an appointment to learn more about how the Financial Wellness Package can enhance your organization's financial management and governance.



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, want your own database, or just feel like chilling out at Access Camp, 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
- > 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 a new season of this popular gathering. We continue our discussion of managing and maintaining your IT. If you're responsible for your nonprofit's technology challenges, you're someone we want to know! Visit <http://tinyurl.com/bagelsandbytes> for more information.

Allegheny: Wednesday, Sept. 2 from 8:30–10 a.m.
at Easter Seals (Cost: \$10)

Downtown: Thursday, Sept. 3 from 8:30–10 a.m.
at the Bayer Center (Cost: \$10)

Westmoreland: Tuesday, Sept. 8 from 8–9:30 a.m.
at Eat n' Park, Greensburg*

West: Wednesday, Sept. 9 from 8–9:30 a.m.
at Eat n' Park, Moon Township*

Allegheny: Wednesday, Oct. 7 from 8:30–10 a.m.
at Achieva (Cost: \$10)

Westmoreland: Tuesday, Oct. 13 from 8–9:30 a.m.
at Eat n' Park, Greensburg*

West: Wednesday, Oct. 14 from 8–9:30 a.m.
at Eat n' Park, Moon Township*

Allegheny: Wednesday, Nov. 4 from 8:30–10 a.m.
at Achieva (Cost: \$10)

Downtown: Thursday, Nov. 5 from 8:30–10 a.m.
at the Bayer Center (Cost: \$10)

Westmoreland: Tuesday, Nov. 10 from 8–9:30 a.m.
at Eat n' Park, Greensburg*

West: Wednesday, Nov. 11 from 8–9:30 a.m.
at Eat n' Park, Moon Township*

Allegheny: Wednesday, Dec. 2 from 8:30–10 a.m.
at Achieva (Cost: \$10)

Downtown: Thursday, Dec. 3 from 8:30–10 a.m.
at the Bayer Center (Cost: \$10)

Westmoreland: Tuesday, Dec. 8 from 8–9:30 a.m.
at Eat n' Park, Greensburg*

West: Wednesday, Dec. 9 from 8–9:30 a.m.
at Eat n' Park, Moon Township*

**Breakfast cost is individual responsibility and not included*

Managing Your Books Using QuickBooks

Thursday, Sept. 10, Tuesday, Sept. 15, Thursday, Sept. 17
from 9 a.m.–noon

If you're the financial manager or bookkeeper of a smaller nonprofit (30 employees or fewer), QuickBooks is your solution for keeping track of all things fiscal. We teach you how to:

- > track expenses and manage restricted and unrestricted income
- > reconcile bank statements
- > create basic financial statements and board reports
- > complete IRS 990s

This class is intentionally small, so bring lots of questions. We answer them. Basic accounting knowledge is recommended for this course.

Instructor: Kathy Mahoney

Fee: \$180 (\$165 if paid by Sept. 3)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

PowerPoint Visuals that Work

Tuesday, Sept. 29 from 1–4 p.m.

Bullets are not only dangerous in guns. Although your presence and preparation make a huge impact on the success of a presentation's ability to inform and persuade, bad visuals can undermine your message. In fact, PowerPoint itself may have taught us bad habits. This class will help you create visuals that will make your facts, stories and ideas stick with your audience.

Instructor: Jeff Forster, Bayer Center

Fee: \$65 (\$55 if paid by Sept. 22), OR

Combine this class with "Get Your Stories Straight" (p. 4) for \$90 (\$80 if paid by Sept. 22)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

Beginning Web Design with Adobe Dreamweaver

Wednesday, Sept. 30 from 9 a.m.–4 p.m.

Are you a website novice who needs to know how to design a basic website that works? Adobe Dreamweaver is the answer. This session is for beginners. Nonprofit staff with no previous web design experience and web design staff who want to learn Dreamweaver are welcome.

Instructor: Cindy Leonard, Bayer Center

Fee: \$125 (\$115 if paid by Sept. 23)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

Learning the Language of Website Accessibility

Tuesday, Oct. 6 from 9 a.m.–noon

How do you make sure your website is accessible to people with disabilities? Locate the resources you'll need to develop an accessible website in-house, or learn the appropriate acronyms and buzzwords to effectively communicate your website's accessibility goals to your developer.

Nonprofit marketing and web design staff as well as beginning website developers are welcome.

Instructor: Tiffany Kuchta, Allegheny Graphics Web Development, LLC

Fee: \$65 (\$55 if paid by Sept. 29) per session

\$90 (\$80 if paid by Sept. 29) for the whole day

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

Learning the Language of Website Accessibility...Literally

Tuesday, Oct. 6 from 1–4 p.m.

This class focuses on the underlying theories of website accessibility and their practical implementation, including an in-depth review of the W3C Web Content Accessibility Guidelines and hands-on instruction. Learn how to use XHTML, CSS and Adobe Dreamweaver to create an accessible website.

Nonprofit marketing and web design staff as well as beginning/intermediate website developers welcome.

The morning session, "Learning the Language of Website Accessibility," is a prerequisite for this course.

Instructor: Tiffany Kuchta, Allegheny Graphics Web Development, LLC

Fee: \$90 (\$80 if paid by Sept. 29) for the whole day

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

Web accessibility classes are presented in partnership with the FISA Foundation.

Get Good Geeks

Thursday, Oct. 8 from 9 a.m.–noon

Your organization brings extensive expertise to meeting your mission, but sometimes you need outside information technology (IT) experts. When it's time to buy new technology or hire someone for an IT project, the process can be intimidating. It can feel like you need to learn an entirely new language. And maybe break the bank.

This workshop will lay out step-by-step what you can do to build a successful relationship with an IT vendor. You will leave the workshop with more confidence in your ability to make good IT decisions and get your organization's needs met for a fair price.

Instructor: Jeff Forster, Bayer Center

Fee: \$65 (\$55 if paid by Oct. 1)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

Website Accessibility: A User's Perspective

Monday, Oct. 12 from 1–4 p.m.

Nearly 20 percent of Americans have some form of disability. While some websites are very easy to navigate, others are built in ways that make them cumbersome and problematic, keeping some users out. Nonprofits need to consider website accessibility in terms of their clients, staff, board members, donors, and volunteers.

Learn to improve the website experience for users with disabilities by working with the most common assistive technology tools for the Internet, including screen readers, magnifiers and devices for those who cannot use a traditional mouse and keyboard. The Bayer Center partners with the FISA Foundation to provide this workshop.

Instructor: Dr. Richard Simpson, University of Pittsburgh

Fee: \$65 (\$55 if paid by Oct. 5)

Location: Center for Assistive Technology, UPMC Health System, Forbes Tower, Suite 3010, 200 Lothrop St. (Oakland)

TechNow

Thursday, Oct. 29 from 8:30 a.m.–3:30 p.m.

TechNow is the only event of its kind in the region: an entire day devoted to technology in nonprofits. Not just for techies, TechNow features useful information and stimulating conversation for executives, board members, finance people and fundraisers.

This year, we will be joined by Mr. Ami Dar, the founder and executive director of Idealist.org. Built in 1996 with \$3,500, Idealist has become one of the most popular nonprofit resources on the web, with information provided by 90,000 organizations around the world, 70,000 visitors every day, and a staff of 60 in New York, Buenos Aires, and Portland. Ami plans to speak about how nonprofits can successfully collaborate, accomplishing more with fewer resources.

We are delighted to be hosted by Robert Morris University at our very own Sewall Center, located on RMU's Moon Township campus. The Moon Township campus is near the Pittsburgh International Airport and is easily reached via car or Port Authority bus.

More details are available online at <http://technow2009.wordpress.com>

Fee: \$100 (\$90 early bird special if paid by Oct. 8)

Location: Sewall Center at Robert Morris University, Moon Township

Presented by:



Managing Client Information with Microsoft Access

Tuesdays, Nov. 5, Nov. 12, Nov. 19, Dec. 3 from 9 a.m.–noon

Service information: whom you serve, how you do it and its impact on individuals, your organization and the community. Funders demand it, and planning can't happen without it.

Learn how to:

- > Track the clients you serve and how you serve them
- > Track service impact
- > Arrange records in household groups
- > Store outcome measurements
- > Create mail merges, rosters, discharge lists and analytical reports

We help you build a client management database template to get you started. No prior database knowledge necessary.

Instructor: Jeff Forster, Bayer Center

Fee: \$240 (\$220 if paid by Oct. 29)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

❖ The Basics of Online Fundraising for Nonprofits – Webinar

Tuesday, Nov. 10 from 2–3:30 p.m.

In this season of technological change, having an effective website is a crucial component of a communications plan. Your website can drastically increase the awareness of your mission, and online giving can help to fund it. Discover the advantages of online fundraising versus traditional methods and hear real-world success stories of nonprofits that are harnessing the power of the internet. Attendees will receive an overview of available online donation tools and tips on how they can implement these tools in their organizations today.

Instructor: Jay Wilkinson, Firespring

Fee: FREE, but registration is required

Location: Your desk, local coffee shop, or wherever you park your laptop

Advanced Excel 2007

Tuesday, Nov. 17 from 9 a.m.–noon

The deeper you go into Excel, the more directions you can pursue. This session goes beyond the typical functions of Excel and into more magic, time-saving techniques you may not have used before.

- > Locking cells
- > Pivot tables
- > Advanced functions
- > Conditional formatting - highlighting cells automatically based on their values
- > Customizing charts beyond the wizard

Instructor: Jeff Forster, Bayer Center

Fee: \$65 (\$55 if paid by Nov. 10)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

It's Easier to be "Green" than You Think!

Thursday, Dec. 10 from 9 a.m.–noon

Adopting a culture of sustainability and realizing both the environmental and economic benefits of energy conservation and "green" technologies aren't limited to just large organizations. This class is designed especially for small to medium sized nonprofits that have a strong desire to reduce their energy and water consumption but lack either the on-site staff or expertise to get started. You will learn about energy management strategies that can be put into practice immediately, as well as opportunities for on-site renewable energy technologies for both existing and new construction.

Instructor: Walter Jenkins, GreenBridge Energy Consortium, LLC

Fee: \$65 (\$55 if paid by Dec. 3)

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

Settling in with Microsoft Office 2007

Customized training

Growing accustomed to a new version of software that we use daily can be both exciting and frustrating. Augh! Where are the features I've loved and used for years? We'll walk you through the promise and the peril of the core applications in the new versions of Microsoft Word, Outlook and Excel. Topics will include new menu ribbons, enhanced features and refreshers on how to do familiar tasks.

Instructors: Jeff Forster and Cindy Leonard, Bayer Center

Fee: Please call or email Cindy Leonard for a quotation, **412-397-6007** or **leonard@rmu.edu**.

Location: Your office with our mobile 10-seat laptop lab or, for up to 25 attendees, our lab at the downtown campus of Robert Morris University located at 600 Fifth Avenue

✚ Does Your Website Work?

60-minute sessions available by appointment

Your website may seem just fine to you, but maybe it's time you had an outsider's take on it. Sit down with our website expert as she provides an honest (and kind) assessment of your site and recommends changes that may improve it.

Instructor: Cindy Leonard, Bayer Center

Fee: \$50

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

✚ Dreamweaver Clinic

60-minute sessions available by appointment

Have a great idea for a website, but no idea how to build it? Bring those Dreamweaver challenges and questions to our maven, and we'll help you create the site of your dreams!

This problem-specific clinic is for all levels of current Dreamweaver users.

Instructor: Cindy Leonard, Bayer Center

Fee: \$50

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

‡ Now What?

A Clinic on Access Databases

60-minute sessions available by appointment

Struggling with an Access database that came with the job and doesn't make sense to you? Built a database that's grown completely out of control? Bring a copy of that problematic database, and we'll help you make sense of it.

Our database guru will:

- > Examine and assess its structure and functionality
- > Recommend whether to scrap it and start over, buy something off-the-shelf, or clean it up and continue to use it
- > Build in some specific tracking and search features if you decide to keep using it

For intermediate to advanced Access users.

Instructor: Jeff Forster, Bayer Center

Fee: \$50

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

‡ PowerPoint Clinic

⊕ *60-minute sessions available by appointment*

There is always room to improve the visuals that we use to aid our presentations. Get one-on-one help to make that presentation sing. Clinic can be used for step-by-step instruction on particular techniques (e.g. formatting, animation, incorporating media) or to workshop an existing presentation for ways to punch up its informative and persuasive power.

Instructor: Jeff Forster, Bayer Center

Fee: \$50

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

‡ Excel/Spreadsheet Clinic

60-minute sessions available by appointment

Other people work magic with spreadsheets; so can you! For complete beginners to advanced users with specific questions, this clinic is your opportunity to become the Excel magician you've always wanted to be! We'll teach you handy tricks of the trade that save time and effort.

- > Write time-saving formulas so that you never have to hand-tally again
- > Read formulas in existing spreadsheets and follow those crazy links
- > Format your spreadsheets for readability
- > Use spreadsheets to dynamically analyze scenarios

Bring your questions – or even better – a spreadsheet you want to improve.

Instructor: Jeff Forster, Bayer Center

Fee: \$50

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

‡ Web 2.0 and Social Media Clinic

⊕ *60-minute sessions available by appointment*

Have you just been handed responsibility for your organization's activities in the realm of social media? Are you baffled and unsure how to begin? Let our social media guru mentor you one-on-one, and you'll be an active social media user in no time! Whether you are attempting to use popular social media tools (such as Twitter, Facebook, YouTube, or Flickr), need help setting up a blog or a wiki, or need assistance with social media strategy, our expert can help.

Instructor: Cindy Leonard, Bayer Center

Fee: \$50

Location: Bayer Center for Nonprofit Management - 425 Sixth Avenue, Suite 2610

Our Clients Speak . . .

We chose to utilize the Bayer Center for Nonprofit Management as consultant/project manager for our capacity-building grant based on our previous experiences with BCNM staff and their expertise in helping nonprofits with technology and communication problems. After a thorough assessment of our needs, BCNM staff helped us formulate a two-year plan to fund, implement and sustain long-term technology and communication improvements for the Agency. Their staff responded promptly to all of our requests, and provided training and services that reflected a clear understanding of our mission, vision and confidentiality issues. With their help, we have acquired the resources and skills to adequately meet the technology and communication needs of the Agency. They are our touchstone.

Victim Outreach Intervention Center (VOICe)
Elizabeth Clark-Smith, Executive Director

Ongoing Activities

ESC

ESC Volunteers bring the best of business thinking to the nonprofit sector through consulting and executive coaching. For more information on volunteer opportunities or hiring ESC, please call **412-397-6000**.

ESC: Leaders Circles

Connect with other nonprofit executives through shared experience and planning. Leaders Circle participants bring their unique knowledge, challenges and concerns, and set their own group's agenda. Guided by a trained ESC facilitator, members brainstorm, offer encouragement, and develop creative and practical solutions to the challenges nonprofit leaders often must grapple with alone.

These confidential meetings provide participants an environment in which they are free to talk about their organizations' most sensitive issues.

Each small group (5 to 7 members) meets once a month for eight months at a location and time determined by its members.

This is a unique opportunity for executive directors and senior staff to connect with their peers and discover solutions to their most pressing issues.

Fee: \$100

ESC: Executive Advising

Attention nonprofit CEOs! Wouldn't it be wonderful to get a whole year of confidential advice and guidance from a smart, experienced private-sector executive? Someone who can help with extremely personal issues, like dealing with stress and burnout, as well as tricky professional issues, such as repairing relationships or managing change in your organization?

Executive Advising pairs you with an expert who will help you formulate goals and a work plan with the flexibility to accommodate the ever-changing realities of your job and your life.

Plan to meet face-to-face once a month, with more frequent phone and e-mail communication as needed.

Call The Bayer Center at **412-397-6000** for more information and fees associated with this service.

LawLinks

Nonprofits can access pro bono legal guidance on a variety of topics through LawLinks. Call **412-397-6000** for more information or to inquire about scheduling a consult or Ask an Attorney clinic.

Master of Science in Nonprofit Management

A unique degree program for nonprofit managers who want to upgrade their skills, offered through Robert Morris University's highly respected school of business. Study the major issues faced by nonprofits – mission, governance, development and others – and learn to use the best business practices to resolve them. For more information, call Kristen O'Hara at **412-397-6803**.

United Way and Bayer Center Resources

The United Way has revised its allocations process, and that means new evaluation and reporting responsibilities for its funded agencies *and* an emphasis on collaboration among the nonprofits it supports.

The Bayer Center has once again joined forces with the United Way to offer valuable resources for nonprofits that are, or want to become, United Way partner organizations.

Pinpoint Planning is a toolkit that allows organizations to take a critical look at their finances and financial management, fundraising, human resources, legal issues, governance, and technology situations. Look for these tools under the "Clinics" section of this catalog.

Classes listed under "**Assuring Quality**" in the catalog explore logic models and program evaluations and relate to the new United Way allocations process.

We've developed a new **Wage and Benefits Survey** of nonprofits throughout the region which is a crucial tool for filling out the new 990 form. You can access this free resource under the "For Agencies" tab at **www.unitedwaypittsburgh.org**.

Custom Training

Got a great idea for a workshop? Looking for something that's not featured in our catalog? Having a tough time aligning schedules to attend a workshop? 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:

- > Nonprofit finance
- > Board development
- > Fundraising
- > Supervision and leadership
- > Technology
- > 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**.

Letter from the Associate Director

"But no matter how much we reduce the line item for paper clips, we still won't save enough to be able to serve one more person!..."

Is this what your board meetings are like? A huge number of nonprofits that I work with complain about this very thing. Their boards get so bogged down in the minutiae of financial details that they never really get to dig into the visionary and broad leadership discussions that should be occupying them.

I know you don't want this. It's a terrible waste of the brain power and great resources your board could provide. Well, the truth is, most of your board doesn't want it, either. They agreed to volunteer their time because they care about what you do, not because they like practicing arithmetic. So, if nobody wants to do this, why does it happen?

A lot of it boils down to comfort. Remember that your board members don't understand your organization the way that you do. If you have multiple programs and multiple funders, the learning curve for seeing how they all fit together can be quite steep. Add to that the issues of jargon, culture, regulations, etc., and it can get awfully confusing.

I remember a government-funded board that I served on long ago. After, literally, years as a member, I still couldn't penetrate the overgrown jungle of acronyms that blocked our path at every meeting. Frankly, I suspected that the Executive Director did this deliberately to keep us at arm's length. So, what is the natural human response? Focus on what you understand. The confused board member will clutch those minor, but comprehensible, expense items like Linus hangs onto his blanket.

Another major contributing factor is simply too much financial information. Does your board really need all the financial data you give it in your reports to exercise its fiduciary oversight and broad guidance? Or are you burying the board under details?

What you should report to your board and how you present it is as much art as science. It takes some give and take, dialogue, and a deep enough understanding of your organization to be able to identify what core information is essential for governing.

Your board needs a concise summary of what is critical, not pages of spreadsheets. Ideally, a one-page, graphical financial dashboard will give them the tool they need to assess your core financial situation in a few brief moments. Things that are going well will be easily confirmed; issues for questioning can be instantly identified. And all of it should be built from an initial assessment of your baseline financial situation that enables you to establish meaningful, but reasonable financial goals.

At the Bayer Center, we've developed a Financial Wellness Package to help nonprofits develop this type of reporting system (see page 11 of this catalog). But you could certainly create your own. The tool you use is up to you; the need for the tool is universal.

It's your decision. If you want your board to spend three-fourths of their meeting time questioning every expenditure, bury them in paper. But if you'd rather have them talking about a vision for the future and creative ways to raise an extra \$500,000, give them concise, governance-oriented financial reports that enable them to act with speed and confidence.

Just let us know if we can help.



Scott B. Leff, Associate Director

Instructors

Regina Anderson is the Director of the Regional Internship Center, a program of the Coro Center for Civic Leadership, working with students, employers, and universities in Southwestern Pennsylvania to build partnerships to establish and strengthen internship programs. The goal of this program is to attract and retain talented college students in the Southwestern Pennsylvania region. Regina received her masters degree in Literary and Cultural Studies from Carnegie Mellon University and a Bachelor of Arts in English Literature from the University of Maine at Augusta, and serves on numerous boards and committees.

Sheila Bell is the Quality Assurance Director for the System of Care Initiative at the Allegheny County Department of Human Services. She has over 10 years of experience working with social service programs and nonprofit agencies to design and implement process and outcomes evaluations and to analyze and report data results. Ms. Bell is also an adjunct faculty member of the Graduate School of Public and International Affairs. She holds bachelor's degrees in political science and sociology and a master's degree in social and public policy.

Henry Beukema is the Executive Director of the McCune Foundation and the Pitcairn-Crabbe Foundation. After graduating from Yale, he served as a missile officer on the USS Leahy, taught military history and naval science at Vanderbilt University's Naval ROTC unit, then moved into higher education administration at the University of Pittsburgh. He recently passed his twenty-ninth anniversary as a western Pennsylvania grantmaker, having spent 12 years with the Heinz Endowments and Pittsburgh Foundation and 17 years at the McCune Foundation. He serves on a number of civic and nonprofit boards engaged in a broad range of economic development and community improvement activities.

Doreen Boyce until recently was the President of the Buhl Foundation. She was the first President of the board of Grantmakers of Western Pennsylvania, as well as President of the board of trustees of Franklin and Marshall College. Ms. Boyce has served on a number of other regional and national task forces and boards. She is a laureate of the University of Pittsburgh and a Distinguished Daughter of Pennsylvania.

Dave Brewton is a native of Pittsburgh with a 25-year career working with faith-based nonprofits. He is Associate Executive Director of the East Liberty Family Health Care Center, a Christian ministry that provides health care for all people without regard to ability to pay. Brewton is responsible for raising more than \$2 million annually and spearheaded a \$5 million campaign that more than doubled the center's capacity. Formerly the first Executive Director of Breachmenders, Inc., an Oakland housing and community development ministry, Brewton is a graduate of the University of Virginia.

Garrett L. Cooper is a Consulting Assistant at the Bayer Center for Nonprofit Management at Robert Morris University. Garrett holds a bachelor's and master's degree in finance from The University of Maryland and has spent five years building expertise in strategic management, corporate finance, financial analysis, and accounting concepts. Garrett is a Pittsburgh-Literacy AmeriCorps alum and a volunteer mentor for Big Brothers & Big Sisters and Community Human Services. He also maintains a part-time adjunct faculty position at the Community College of Allegheny County (CCAC).

Ellen J. DeBenedetti, M.Ed., is the Training Coordinator and Senior Mediator for Conflict, Resolution, Mediation and Training Services of CVVC. She mediates and does training in conflict management, mediation, facilitation, negotiation and related skills for community members, school districts, police departments, hospitals, universities, businesses and nonprofits. As a certified mediator by the Institute for the Study of Conflict Transformation, Ellen also mediates for: Equal Employment Opportunity Commission, United States Postal Service, PA Department of Education, Key Bridge Foundation, Transportation Safety Administration, University of Pittsburgh Medical Center, and US District Court of Western Pennsylvania.

Dee Delaney has been Executive Director of FISA Foundation since 1996. The Foundation's grantmaking focuses on improving the quality of life for women, girls, and people with disabilities in SWPA. Dee serves on the board of the Disability Funders Network and on the advisory committees of the UPMC Disabilities Resource Center, Magee-Womens Hospital Center for Women with Disabilities, University of Pittsburgh Rehabilitation Counseling Program, and the Achieva Health Policy Forum on Dental Care for People with Disabilities. She is a graduate of Saint Mary's College, Notre Dame, Indiana and Leadership Pittsburgh XXII.

Jeffrey Forster is a Senior Consultant at the Bayer Center for Nonprofit Management at Robert Morris University. He has assisted a variety of nonprofit organizations in the Pittsburgh area, specializing in the use of databases for process improvement. Previously, he served as Policy Analyst in the Pittsburgh Planning Department and as an Information Management Specialist at Carnegie Mellon University.

Ray Frankoski joined ESC as a volunteer in 2001 following his retirement as Director of Human Resources at Westinghouse Government & Environmental Services Co. In addition to serving as a project manager, Frankoski has consulted with the ALS Association, Western PA Chapter; the Borough of Dormont; Braddock's Field Historical Society; Community Design Center of Pittsburgh; Gwen's Girls; Holy Family Institute; The Mattress Factory; Parkinson Chapter of Greater Pittsburgh; and Peer Support and Advocacy Network. In his spare time, he helps to care for his four grandchildren.

Teresa A. Gregory, CFRE, is Director of Foundation and Government Grant Seeking at Robert Morris University. She has directed campaigns of \$200,000 to \$20 million for a wide variety of organizations, including major research universities, professional theaters, museums and small grassroots organizations. Gregory also has taught at the Foundation Center and in the Master of Arts Management program at the Heinz School of Public Policy at Carnegie Mellon University. She is an active member of the Western Pennsylvania chapter of the Association of Fundraising Professionals.

Sarah Hardin is the Volunteer Program Manager at Carnegie Science Center. In addition to coordinating Carnegie Science Center's Internship Program, Volunteer Program and Teen Volunteer Program, she has recruited and managed volunteers for the popular exhibitions *BODIES... The Exhibition* and *Titanic: The Artifact Exhibition*. Previously, she worked in various capacities with social service nonprofits in the Pittsburgh region. She is a graduate of the Graduate School of Public and International Affairs at the University of Pittsburgh.

Phyllis G. Hartman, SPHR, PGHR Consulting, Inc., has over 22 years experience as a human resources professional providing HR consulting services to the nonprofit and for-profit sectors including recruitment, outplacement coaching, and employee relations. She has a MS in Human Resources Management from La Roche College and teaches HR and business courses at both La Roche and Slippery Rock University. Hartman is active with the Pittsburgh Human Resources Association and has served on the board and as President in 1997. She recently co-authored a book, "Never Get Lost Again: Navigating Your HR," released by the Society for Human Resources Management.

Maureen Mahoney Hill, CFRE, is an independent consultant working with nonprofit organizations to build fundraising, communications and marketing capacity, specializing in planning and strategy development for major and planned gifts. With almost 20 years experience in fundraising, she has held development positions with The Children's Institute, the Pittsburgh Foundation, Penn State and The Women's Center and Shelter of Greater Pittsburgh. Maureen holds a bachelor's degree in Human Development from Penn State and a master's from the School of Social Work at Pitt.

Alan James recently retired from his position as Dean of Student Affairs at California University of Pennsylvania. His areas of expertise are in personnel management, leadership development and management coaching. He is a certified Stephen Covey Trainer and has completed the Center for Creative Leadership's Coaching for Development Program. He completed a doctoral program in Administration and Leadership Studies at Indiana University of Pennsylvania.

Allison Jones is the Director of Boards-by-Design for the Nonprofit Leadership Institute at Duquesne University. She has helped over 300 local nonprofits connect with over 1600 interested board members through the Boards-by-Design program and through Nonprofit Speed Dating. Prior to joining the NLI, she was a high school music teacher and musical director.

Wally Jenkins is the President and CEO of GreenBridge Energy Consortium, a firm specializing in energy management and renewable energy systems for nonprofits. He has more than 20 years experience in the nonprofit and small business sectors and has served on numerous nonprofit boards ranging from community-based and faith-based to education and associations. He is certified as a LEED Accredited Professional (LEED® AP) by the U.S. Green Building Council, and he has earned the designation of Certified Energy Auditor (CEA) from the Association of Energy Engineers. Wally received a bachelor's degree from the University of New Hampshire and an M.S. degree from Indiana Wesleyan University.

Tiffany Kuchta is the Director of Web Development at Allegheny Graphics Web Development LLC, and has overseen more than 130 projects, including several large-scale nonprofit websites with strict accessibility requirements. She is Chairwoman of the steering committee for Infinity Women's Giving Circle and is a former Chairwoman of the Tri-County Technology Consortium. Kuchta has a bachelor's in computer science from Allegheny College, and has presented unique research at the Genetic and Evolutionary Computation Conference that was published in the conference's proceedings.

Michael Kumer is the Executive Director of the Nonprofit Leadership Institute and Associate Dean of the School of Leadership and Professional Advancement at Duquesne University. Since assuming the directorship of the NLI, Michael has helped nonprofit boards successfully achieve excellence in all areas of governance, including strategic planning, board member recruitment, and effective board structures.

Scott B. Leff is the Associate Director of the Bayer Center for Nonprofit Management at Robert Morris University. He has spent more than 25 years as a senior-level business executive, entrepreneur, consultant to nonprofits, and board member. His expertise is in strategic, financial, sustainability and business planning, marketing, social enterprise, mergers and alliances, organizational development and executive management. Scott has an M.S. degree from Carnegie Mellon University.

Cindy Leonard is the Technology Services Manager for the Bayer Center for Nonprofit Management at Robert Morris University. She has over nine years of experience in helping nonprofits to leverage technology, most recently serving as the Information Technology Coordinator for PA CleanWays. She has also assisted various nonprofits in the past as a private consultant. An experienced website designer, she adds website planning, design and assessment to the portfolio of services at the Bayer Center. Cindy holds a B.S. in computer science and an M.B.A. from Seton Hill University.

Kathy Mahoney has worked in public accounting with Arthur Andersen & Co., and has audit experience with nonprofits, financial institutions and manufacturing companies. She has used QuickBooks for various clients including nonprofits, publishers, restaurants, service industries and a private school.

Lynn McGuire-Olzak is the Volunteer Coordinator of the Western Pennsylvania Conservancy Community Gardens department and is responsible for over 10,000 volunteers who help maintain the Conservancy's 140 gardens. Before working at the Conservancy, she was the Volunteer Coordinator for the Greater Pittsburgh Community Food Bank and the Light of Life Rescue Mission. Lynn is committed to volunteerism, having volunteered at Animal Friends, the Women's Shelter of Pittsburgh, and Tree Vitalize.

Thomas R. Moore is a Director in the Pittsburgh office of the investment firm, Greycourt & Co. Previously, Tom advised charitable organizations and individuals at Morgan Stanley. He has been a Senior Vice President at PNC Advisors, served in various positions in trust and private banking, been a fundraiser at Carnegie Mellon University, and served as staff attorney for the Episcopal Diocese of Pittsburgh. Tom has been adjunct faculty at the Heinz School at Carnegie Mellon University, as well as served on a variety of boards including Kenyon College, Gateway to the Arts, and The Pittsburgh Recovery Center. He is a graduate of Kenyon College, Ohio Northern University's Pettit College of Law, and the Heinz School.

Debbie Moses is the Senior Relationship Manager for Charitable Management Services at Fifth Third Bank. Previously, she was a portfolio manager for Bank of New York Mellon and PNC Financial, and served as the first Executive Director of PowerLink. Debbie has a master's in Public Policy from Carnegie Mellon University and is an advisor to Susan G. Komen for the Cure Investment Committee, Strong Women Strong Girls, Calliope Folk Music Society and FundScience, and is a committee member of The Pittsburgh Foundation Scholarship and the YWCA Racial Justice Awards. She was honored by the U.S. Small Business Administration as a Woman-Owned Business Advocate in 2004 and received the CMU Alumni Service Award in 1993.

Peggy Morrison Outon is the founding Executive Director of the Bayer Center for Nonprofit Management at Robert Morris University. She is also the founding Director of the Centers for Effective Nonprofit Management in Austin, Texas, and New Orleans and the founding board Chair of the Alliance for Nonprofit Management. A nationally noted consultant and trainer, Outon has worked with more than 500 nonprofit clients. She served as founding member of the Drucker Foundation's international training team and as a trainer and advisor to the Institute of Global Ethics. In August 2006, she was named to the national *Nonprofit Times Top 50 for Power and Influence*.

John Pippy is Senator of the 37th District serving portions of Allegheny County and Washington County, and previously was a member of the Pennsylvania House of Representatives in the 44th District for eight years. Senator Pippy is Chairman of the Senate Republican Policy and of the Legislative Budget and Finance Committees, as well as a member of several other Senate Committees including Appropriations, Game and Fisheries, Law and Justice, State Government, and Transportation. Senator Pippy received an appointment to the United States Military Academy at West Point, NY, and was graduated with a Bachelor of Science degree in environmental engineering.

Jonathan Potts, a former newspaper reporter and editor, has been the Director of Public Relations at Robert Morris University since 2007. In that capacity he oversees media relations, publications, strategic communications and social media initiatives. He previously served as the Director of Media Relations for the College of Humanities and Social Sciences at Carnegie Mellon University. His media placements have included the New York Times, the Wall Street Journal, NBC Nightly News, the Pittsburgh Post-Gazette and the Chronicle of Higher Education.

Rich Simpson, Ph.D., is an Associate Professor at the University of Pittsburgh Department of Rehabilitation Science and Technology. Besides research and teaching, he mentors students and provides clinical computer access services at the Pitt Center for Assistive Technology. Dr. Simpson has a bachelor's in computer science from Virginia Tech, and master's degrees in computer science and bioengineering and a doctorate in bioengineering, all from the University of Michigan. He is a certified assistive technology practitioner.

Dave and Sue Stewart have worked in both direct care and in leadership roles of community-based urban nonprofits for over 25 years, and have worked extensively with the homeless and disenfranchised. Dave has been the Director of a soup kitchen, homeless shelter and drop-in center and was responsible for coordinating the case management component. He and Sue were instrumental in developing an integrated delivery system consisting of 12 agencies including primary care, behavioral health and social service. Sue was the nurse for a federally qualified health center when it opened in 1982, and started its homeless outreach program. She has also done homecare for the elderly and community based case management for the severely and persistently mentally ill.

Mark D. Sullivan is Senior Vice President and Director of the Treasury Management Department for First National Bank. He is responsible for developing the strategy for banking products that focus on innovative cash management services to help customers gain the most value from their cash deposits. Mr. Sullivan has a B.S. degree in Business/Economics from Miami University of Ohio, and an MBA from the University of Pittsburgh.

Maria Zeglen Townsend, Ph.D., is the President of Townsend Associates LLC and adjunct faculty at the University of Pittsburgh Graduate School of Public and International Affairs where she has taught evaluation, statistics and policy analysis. Over the past ten years, Dr. Townsend has conducted needs assessments and evaluations across Pennsylvania. She has also trained staff from local and county human service agencies in Western Pennsylvania, county and state Mental Health and Developmental Disability providers, and country-wide child care planning committees across Pennsylvania on evaluation methodology.

Robert “Bobby” Vagt joined The Heinz Endowments as President in January 2008. During his career, Mr. Vagt has been warden of a North Carolina prison; Director of Clinical Programs in an Alabama mental health center; Assistant Director of the Budget for the state of New York; President of Davidson College; and Executive Director of several public benefit corporations. He has served as chairman of the Children’s Defense Fund and as a parish associate responsible for youth programs at churches in New York and Texas. Mr. Vagt earned a Bachelor of Arts in psychology from Davidson College and a Master of Divinity magna cum laude from Duke University .

Yvonne Van Haitsma has been a Consultant at the Bayer Center since 2000 and is Coordinator of the ESC program. She has 14 years of experience with nonprofit organizations locally and internationally and has consulted with nonprofit organizations in collaboration development, strategic planning, board development and executive transitions locally and in El Salvador and Ecuador. Ms. Van Haitsma earned her master’s in community organizing and nonprofit management at the University of Pittsburgh.

Lenora Vesio is a Pennsylvania-registered fundraising professional and nonprofit consultant who emphasizes strategic planning and fundraising. She had a career in public relations and philanthropy at AT&T for more than 20 years before retiring in 2003, during which she was responsible for philanthropy across Pennsylvania and represented AT&T on nonprofit boards including The Mattress Factory, the Pittsburgh Ballet Theater, the United Way, and the Salvation Army. Lenora earned her master’s in Technical Communication from Rensselaer Polytechnic Institute, and her undergraduate degree in English and Creative Writing from Carnegie Mellon University. She is a member of the Alliance for Nonprofit Management

Jake Wheatley Jr., represents the 19th Legislative District in the PA House of Representatives, including the Hill District, North Side, South Side, Allentown, Hazelwood, Downtown, the Bluff, Knoxville, Beltzhoover, Manchester, Arlington, Arlington Heights, and West, South and North Oakland. He was selected to serve on the Appropriations Committee as a first-term legislator. Wheatley also serves as Majority Chairman of the Appropriations Subcommittee on Education and the Health and Human Services Subcommittee on Health, as well as being Treasurer for the Pennsylvania Legislative Black Caucus, Vice Chair for the Democratic Policy Committee, and Deputy Majority Whip for the House Democratic Caucus.

Jay Wilkinson speaks with thousands of nonprofits about internet and marketing issues throughout the United States. He has appeared on CNN and other news programs discussing how emerging technologies affect nonprofits. Jay is considered a leading authority on the proper use of the web as a communications tool to enhance the core mission of an organization. As a board member of several nonprofits, Jay understands the unique issues facing nonprofits today.

Katrina Woodworth is a R.Y.T. certified Hatha yoga instructor. She currently teaches at Yoga on the Square, Schoolhouse Yoga Studios and Vintage Senior Center. She also offers private yoga instruction to take care of the mind, body and spirit. She lives in East Liberty with her husband and four children.

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