

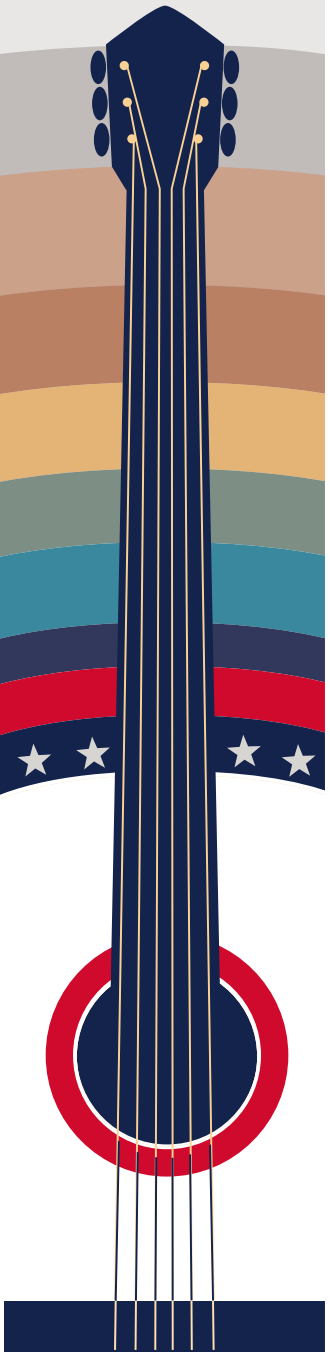
BAYER CENTER FOR
NONPROFIT MANAGEMENT
AT ROBERT MORRIS UNIVERSITY

★ PRESENTS ★

FALL 2022
COURSE
CATALOG

WE'RE ALL
IN THIS
TOGETHER
IF WE'RE
IN IT
AT ALL."

JOHNNY CASH



BAYER CENTER FOR
NONPROFIT MANAGEMENT
RMU.EDU/BCNM

LETTER FROM PEGGY MORRISON OUTON

For more than twenty years, our motto has been that nonprofits build strong communities. Our quote for this year comes from Johnny Cash, “We’re all in it together if we’re in it at all.” Over our twenty-three years of work and service, we have seen literally countless examples of nonprofits doing yeoman service to their community. During this endless global pandemic, we have seen so many of you rise and shine yet again. **I am so proud to know you.**

But what is the “it” of which our quote speaks? What is the “it” we’re in? I don’t think we yet know what has happened to us as a society as a result of these past few years.

Some of what has happened is unequivocally positive for those who are serious community builders. There has been a greater recognition of unfairness, bias and discrimination in hiring, advancement and access to opportunity for people of color and those organizations they lead. If you have not yet read PACE’s (Program to Aid Citizen Enterprise) deep research on the inequity of access to necessary capacity building resources (think financial audits and support to boards), go to their [website](#) for an eye-opening experience. The ongoing dialogue about equity and fairness and new support from funders for minority-led organizations is healthy. So that’s part of the “it” we’re in together...intentionality about the way in which we do our work to advance the society in which we wish to live.

But what else is “it?” I don’t know about you, but I feel my connection to the larger nonprofit society is frayed. When we were in our downtown offices, we saw more than 3,000 of you over the course of a normal year of classes and meetings. So many chances to catch up, ask a question, give a hug or a compliment...to encourage and unite. Now it seems, we are endless years into zoom meetings and guarded in-person meetings. I don’t know as much as I did about how you’re doing, what solutions you’re building for those you serve. Like so many of you, we have remained very busy during the Great Pause – busy, but with far less connection. How do we discern what to keep and what to let go of from the patterns and ways of working we developed to meet the global crisis?

The “it” also includes the personal reassessment of purpose – *am I in the right job?* What we have heard from clients and friends is that for many of you, the answer is definitely yes. But we have also heard that lower pay and less attention to HR has narrowed the pipeline to fill any vacancies. How do nonprofits best compete in an unprecedentedly competitive job market? And what do we do without the PPP loans that paid our people during the crisis? HR has been an unfunded mandate for far too long...maybe one of the blessings of the pandemic will be a reassessment of the value and importance of our people. I would truly rejoice if that is true.

One thing I know for sure is that we are, like it or not, in it together. And another thing I know for sure is that the people and organizations that make up our nonprofit sector community have regularly done impossible things before breakfast! But here’s the deal...I was talking to a new friend about improved practice around diversity, equity, inclusion and belonging and she said that so much of what is needed is intentionality. We must design our systems going forward to address the ways in which we work. We must examine ourselves and build anti-bias checks, so we are not hypocrites as social justice warriors. We must insist on building a new version of what strong community is. That word “together” seems particularly challenging in these times. But here’s what I believe...“We’re all in it together, if we’re in it at all.” So, let’s be sure not to lose the productive possible change and learning from these pandemic years.

Peace, joy and courage to each one of you as we begin the Fall of 2022. It’s going to take our very best to be in it. I know you’ve got it. My heart lifts as I think about the wonderful things you will do with the time, money, relationships, and opportunities that await you. Excelsior, beloveds.

Peggy Morrison Outon

Peggy Morrison Outon

Assistant Vice President for Community Engagement
and Leadership Development

22 August 2022

**WE’RE ALL
IN THIS
TOGETHER
IF WE’RE
IN IT
AT ALL.”**

JOHNNY CASH

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CLASSES BY DATE

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SEPTEMBER

SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

OCTOBER

SUN	MON	TUE	WED	THU	FRI	SAT
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16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

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SUN	MON	TUE	WED	THU	FRI	SAT
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13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

DECEMBER

SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
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BAYER CENTER FOR NONPROFIT MANAGEMENT

BENJAMIN RUSH CENTER
6001 UNIVERSITY BOULEVARD
MOON TOWNSHIP, PA 15108

RMU.EDU/BCNM

Not like anybody else.

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

Every one of our solutions is a custom solution.

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

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

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

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

Your reality is our reality.

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

In 22 years of service to the nonprofit community, the Bayer Center has completed over 2,550 consulting engagements and educated over 14,000 students. Our consulting clients include human services, arts, faith-based, community development, environmental and educational organizations with budgets ranging from \$100,000 or less to more than \$50,000,000. Our intensive and customized management, governance and financial consulting services are designed to educate leaders and have resulted in:

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

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



COVESTRO CENTER FOR COMMUNITY ENGAGEMENT

BENJAMIN RUSH CENTER
6001 UNIVERSITY BOULEVARD
MOON TOWNSHIP, PA 15108

RMU.EDU/COVESTRO

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

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

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

Nonprofits can get connected by
contacting Yvonne VanHaitsma
at 412-397-6002 or
vanhaitsma@rmu.edu.

BOARD ENGAGEMENT DRIVES RESULTS

Board engagement has risen as one of the key things that board presidents and executive directors have mentioned as an issue in a COVID world. Many boards jumped into overdrive and are tired now. Others went into limbo/virtual/hybrid mode and are having a difficult time coming through. We feel your pain!

The Covestro Center for Community Engagement is here to help. We have designed a flexible customized program to work with any board to help them move to the next level. Boards from small grassroots organizations have learned critical skills in board roles and responsibilities. Boards of larger, established organizations have been able to focus on a key area of growth and have received matches that expand their current network and bring needed skill sets and diverse representation.



BoardsWork! nonprofit program drives engagement

1. Self-Assessment and Board Review

We work with each board member to think about their board's function – in their ambassadorship, their levels of inclusion and equity, their clarity on roles and responsibilities, and committee engagement. Along with more in-depth surveys with the board chair and ED, and a review of their bylaws and recent minutes, we get a deep understanding of their board functions and challenges.

2. Board Retreat

We facilitate a 3 – 4 hour board retreat (virtual or in person) to discuss the issues that are most pressing to improve your board governance. The agenda is crafted jointly with our facilitator and your leadership. This time together drives commitment, builds connections, clarifies roles and makes space for creativity.

“THE CONVERSATIONS REGARDING BOARD DEVELOPMENT IN OUR RETREAT WERE VERY HELPFUL. THE FACILITATOR DID A FANTASTIC JOB CREATING A PROGRAM THAT REALLY ENGAGED OUR BOARD.”

~Tammy Schuey, Board President, Gaiser Center.

3. Matching

We match a minimum of one (and sometimes two) board members with your organization. This creates a board with more diverse experience, broadened networks and new thinking. We work with local companies to provide a full day training to their leaders in boardmanship, finance, fundraising, planning and oversight as an introduction to effective board leadership. Once we have an understanding of their skills and interests, we provide a customized match to your needs.

4. Ongoing Support

Board members receive 20% off of our virtual classes for a full year after engaging with us. We can help further their learning or equip them with deeper knowledge of nonprofit functioning.

COST: Nonprofits can participate in this program for \$500 for organizations with budgets under \$2 million or \$1000 for organizations over \$2 million. The full process is valued at over \$2,500, but due to subsidies from our business partners, we can offer this for far lower than the actual cost.

BoardsWork! training program equips new board members

Some boards support the registration of all of their new board members to participate. We cover boardmanship – key roles and responsibilities, fundraising, financial management and the boards role in planning, DEI and oversight. This training program is hosted 4 times a year, includes up to 7 additional virtual classes in our catalog and is available with matching to a new nonprofit board or to help shore up the skillsets of existing board members.

COST: This package is \$400 per person (add \$250 for matching)

See www.rmu.edu/covestro for more information.

Contact Yvonne VanHaitsma at 412-397-6002 or vanhaitsma@rmu.edu to get started.



**BAYER CENTER FOR
NONPROFIT MANAGEMENT**

RMU.EDU/BCNM

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 financial consulting and classes is always on the practical. We're pretty good with the numbers, but we've lost count of how many clients have told us that we made accounting understandable for the first time. Whether we're with you in a webinar or working as your consultant, our goal is to help you use your finances as a tool for managing your organization and delivering your services more effectively. Clarity is our business.

Some of the ways we assist organizations are:

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

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

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FINANCE CLASSES

The Board’s Role in Financial Management

Tuesday, Oct. 11 from 10 – 11 a.m.

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

INSTRUCTORS: Jared V. Henigin, Wealth Management Partners, LLC and Michele O’Leary, Zelenkofske Axelrod, LLC

FEE: \$30

Designing QuickBooks for Nonprofits

Tuesday, Oct. 11 from 1 – 3 p.m.

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

INSTRUCTOR: Melanie Rutan, Bookminders

FEE: \$40 or \$65 for both QuickBooks classes

Mining QuickBooks for Nonprofits

Tuesday, Oct. 25 from 1 – 3 p.m.

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

INSTRUCTOR: Melanie Rutan, Bookminders

FEE: \$40 or \$65 for both QuickBooks classes

PLEASE NOTE: *The instructor will be showing how to create reports using QuickBooks Desktop. The principals are the same when creating reports in QuickBooks Online, but there will be slight differences in screen view.*

Understanding Accounting Principles Unique to Nonprofit Organizations

Tuesday, Dec. 6 from 10 – 11:30 a.m.

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

INSTRUCTOR: Drew Zerick, Sisterson & Co. LLP

FEE: \$35

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

Finance Clinic

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

WE CONSULT!

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

During our 22 years of service to the community, we have completed over 2,550 consulting engagements. Our clients include environmental, arts, education, human service, community development, and advocacy organizations with budgets ranging from \$100,000 or less to more than \$50,000,000.

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



**BAYER CENTER FOR
NONPROFIT MANAGEMENT**

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NONPROFIT MANAGEMENT

What *isn't* nonprofit management?

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

Some of the ways we assist organizations are:

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

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

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NONPROFIT MANAGEMENT CLASSES

Executive Director Huddle

Thursdays, Sept. 8, Oct. 13, Nov. 10 and Dec. 8
from noon – 1 p.m.

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

FACILITATOR: Wendy Burtner, Wendy Burtner Consulting/ Nonprofit SideKick!

FEE: Free, but RSVP is required

BoardsWork! Mixed Cohort

Thursday, Sept. 15 from 8:30 a.m. – 4:30 p.m.

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

INSTRUCTORS: Peggy Outon and Yvonne VanHaitsma, Bayer & Covestro Centers and guests

FEE: \$650 (\$400 without matching)

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

Board Committees: Friend Not Foe

Tuesday, Sept. 27 from 1 – 2:30 p.m.

Effective boards of directors generally use committees to facilitate their work. Not every effective board, however, has or even needs the same number and types of committees. After completing this class, you will be able to identify the characteristics of effective board committees, describe various committee structures and know how to populate committees for maximum effect.

INSTRUCTOR: Brett Fulesday, ESC

FEE: \$35

Pitching Your Way to Earned Media

Wednesday, Sept. 28 from 1 – 2:30 p.m.

Do you want your organization to be featured in news outlets for free while maintaining meaningful partnerships with local journalists? It's the most effective way to raise more money, recruit new volunteers and spread awareness for your mission. Nonprofit communications expert and former news anchor Maria Satira will explain how you can share your story with the community through earned media opportunities. Attendees will learn how to properly pitch stories to local media, craft effective press releases and create an effective media relations strategy, without spending a dime.

INSTRUCTOR: Maria Satira, Maria Satira Media, LLC

FEE: \$35

Common Misperceptions About Planned Giving Programs

Thursday, Sept. 29 from 1 – 4 p.m.

Have you wanted to start a planned giving program, but have been discouraged or intimidated by a lack of resources, planned giving expertise or time? In this interactive session, we'll dispel common myths about planned giving programs. You'll leave this session with a methodology to develop a scalable planned giving program.

INSTRUCTORS: Jack Owen, Esquire & Kara D. Mostowy, CFRE, GPC

FEE: \$65

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

MAGIC: 5 Keys to Employee Engagement

Tuesday, Oct. 4 from 10 a.m. – noon

Employee engagement is vital to retaining high-performing employees, especially amid the Great Resignation. Most leaders understand engaged employees are passionate about their jobs and deliver better results. They also know what it looks and feels like to either be engaged or disengaged, but they don't always understand how it works. This workshop will introduce five keys of employee engagement and show leaders how they can help employees and themselves achieve higher levels of it.

INSTRUCTOR: Tom Sullivan, ProGrowth Associates

FEE: \$40

NOTE: ALL CLASSES ARE ZOOM SESSIONS UNLESS OTHERWISE NOTED. 

EXECUTIVE COACHING

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

Cost: \$500 for each 5-hour coaching engagement. Smaller packages may be negotiated upon request. For more information, please contact Carrie Richards at **412-397-6008** or **richardsc@rmu.edu**.

NONPROFIT MANAGEMENT CLASSES

Nonprofits and Major Gifts: Keys to Success

Wednesday, Oct. 5 from 9 a.m. – noon

Identifying, cultivating and soliciting major gift prospects is vital to the success of every organization, but presents special challenges for smaller nonprofits – those with budgets under \$2 million. This in-person class will cover important topics including setting the threshold for a major gift that is right for your organization; identifying, cultivating and soliciting major gift prospects; and strategies for elevating smaller donors to major gift status. Who should attend: members of the board, executive director and development staff.

INSTRUCTOR: Mark Lynch, Carter Global

FEE: \$65

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

Feedback and Difficult Conversations

Thursday, Oct. 6 from 10 a.m. – noon

Communicating with others is hard enough in-person. In virtual settings, the challenges multiply. In this workshop we'll address key strategies for good management and team communications that apply to in-person and virtual settings. Participants will learn:

- ★ How to give – and receive – productive feedback
- ★ Tips for understanding different communication styles
- ★ How to structure conversations, especially difficult ones, so that they are empathetic and productive
- ★ Challenges and applications for adapting from in-person to virtual conversations

INSTRUCTOR: Trina Walker, TLW Strategy

FEE: \$40

Stay in Touch: An Interactive Session on Touchpoint Design

Friday, Oct. 7 from 10 – 11 a.m.

In this online class, we will discuss the various touchpoint opportunities that can be built into your donor management strategies. Every donor is unique, and a variety of communications are essential to ensure donors hear what you have to say. Strategic customization is key to building a sustainable workload, effectively communicating your program's needs and impacts, and pulling donors closer to your organization. This class will involve an overview of various touchpoints that are often overlooked as well as a discussion of what your organization needs. Attend this session to connect deeper with your donors and support your fundraising colleagues with a brainstorm.

INSTRUCTOR: Michaela Kizershot White, The Pittsburgh Symphony

FEE: \$30

"You're Not the Boss of Me!" Better Leading Through Coaching

Wednesday, Oct. 12 from 10 a.m. – noon

Most people really want to create great value. Leading for breakthrough results requires investment in their inside-out growth for transformative action. Learning together, explore how you can bring a coach's mind and heart to your leadership. Lead like a coach, and watch your team step out with vision and courage, resilience and agility. Learning objectives include:

- ★ "I don't need a boss. I want a coach." What does research reveal about employee engagement? What do they really want? What do they need, but don't know it yet? What are the potential positive outcomes of coaching?
- ★ What is coaching? How does it differ from and complement supervising, managing, advising, even mentoring? Gain a working definition and maintain necessary boundaries.
- ★ How do we go about developing a "coaching habit?" Here are the key moves for having powerful conversations for engagement and growth by taking a "coaching stance."

INSTRUCTOR: Chris Thyberg, The Serving Way

FEE: \$40

CUSTOM TRAINING

Like the topic but can't make the training? Want to bring a set of skills to your entire team? Searching for something that's not quite a match for what's in the catalog? Custom training may be just what you're looking for. We work with you to design and facilitate interactive trainings for groups of 5 to 105 on topics ranging from change management and leadership to communication and customer service. Our extensive experience in conducting workshops can be tailored to your organization's specific needs. For more information, contact Carrie Richards at **412-397-6008** or **richardsc@rmu.edu**.

NOTE: ALL CLASSES ARE ZOOM SESSIONS UNLESS OTHERWISE NOTED. 

NONPROFIT MANAGEMENT CLASSES

Putting LinkedIn to Work for Your Organization

Wednesday, October 12 from 1 – 2 p.m.

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

Instructors: Lynette Asson and Yvonne Hudson, New Place Collaborations

Fee: \$30

Supervisor Myth Busters: Approaches to Becoming a Better Supervisor

Thursday, Oct. 13 from 10 – 11:30 a.m.

Whether you are a new supervisor, on a supervisory track, or an experienced supervisor who’s finding the current work climate and employees a puzzle, this is the class for you. We will talk about some of the challenges faced by supervisors in today’s workplace, and bust some myths about how to oversee employees successfully. This fun and interactive session will tap into the audience’s experience and the facilitator’s over 30 years of knowledge in human resources, helping supervisors to be more successful. Bring your questions and be prepared to grow your expertise about good supervision.

Instructor: Phyllis Hartman, PGHR Consulting, Inc.

Fee: \$35

Facing the Labor Market Challenges: What’s a Nonprofit ED to Do?

Friday, Oct. 14 from 10 – 11 a.m.

Global Links has shown resilience and vibrance throughout the pandemic – but how did they not only survive, but THRIVE during such unprecedented times? Join us as we talk with Global Links’ Executive Director, Angela Garcia, about challenges in staff recruitment and retention, and new ways of working that produce excellent results during both blue skies and stormy weather.

CONVERSATIONALISTS: Peggy Morrison Outon, Bayer and Covestro Centers and Angela Garcia, Global Links

Fee: \$10

Built to Last: Building Capacity for Long-term Sustainability

Thursday, Oct. 20 from 10 – 11: 30 a.m.

Change is inevitable. Growth is a choice. How can we prepare for and sustain our organizations (and ourselves) through the inevitable? In this class, we will explore the ability of a nonprofit organization to monitor, assess and respond to and create internal and external change. We will look at ways to simultaneously strengthen the core, the foundation of our organization and stimulate progress through both process improvement and risk mitigation. We will identify the elements and processes that make an organization strong and chart a clear course to improve our organization’s health.

Instructor: Chris Cooke, Cooke Consulting

Fee: \$35

Get Lean/Stay Agile

Friday, Oct. 21 from 10 – 11:30 a.m.

If you heard about an approach to work that prized individuals and interactions, customer delight, collaboration and the ability to respond to change, would it shock you to hear that it was developed to improve software development? Agile software development practices arose from frustration with traditional “waterfall” practices, like wasted resources and burnout. The idea of releasing a “lean” version of a product frequently pairs with agile development. Lean product releases allow users to dictate the experience they want, making better use of resources and increasing satisfaction.

In this session, a few nonprofit veterans who now develop software together will lead a discussion on how agile and lean concepts might also help solve problems and increase success for nonprofit organizations. Together, we’ll explore pieces of these approaches that may translate:

- ★ Prioritize satisfying the customer
- ★ Success is the primary measure of progress
- ★ Support and trust motivated individuals
- ★ Reflect on how to become more effective and adjust behavior
- ★ Self-organized teams
- ★ Sustainable pace of work

Instructors: Jeff Forster and Leslie Bachurski, Truefit

Fee: \$35

Leading Efficient and Effective Meetings

Tuesday, Oct. 25 from 10 – 11 a.m.

In this course we will discuss what problems you currently experience with meetings in your organization, then look at strategies for making this most-expensive form of communication more effective and efficient. We will cover strategies to employ when preparing for a meeting, how to make the meeting itself more focused and aligned with your goals, how to maximize the time spent in the meeting by ensuring attendees follow-up with their actions, and whether a meeting is even needed in the first place! Portions of this course will be interactive, demonstrating how improvisational comedy techniques can be used to increase engagement in a meeting and break down barriers that restrict the free flow of ideas.

Instructor: Kevin Erdner, Philips Healthcare

Fee: \$30

NONPROFIT MANAGEMENT CLASSES

Build-Your-Own Campaign: Annual Fundraising Appeals

Wednesday, Oct. 26 from 10 – 11:30 a.m.

Offer your supporters an exciting and engaging way to show their love for the work you do through your organization's annual fundraising appeal. Answering a few key questions can help your team design a customized and effective annual appeal. Participants will learn how to combine the essential elements of all successful annual campaigns – donors, case and process – into a program that inspires and motivates your organization's closest friends. You will receive a useful planning checklist to help them create a new annual appeal program or refresh an existing approach.

INSTRUCTOR: Jo Ellen Parker, ESC

FEE: \$35

Diversity, Equity and Inclusion: Building a Foundation and Creating a Strategy (2-part series)

Thursday, Oct. 27 and Thursday, Nov. 3
from 10 – 11:30 a.m.

This interactive workshop series is designed to create deeper understanding of the meaning and value of diversity, equity and inclusion (DEI). Participants will gain insight into a quality definition of Diversity, Equity and Inclusion and appreciation for how unconscious bias awareness can promote meaningful DEI for nonprofit organizations. The participants will also consider their own DEI profile to inform a conversation on big picture approaches to organizational strategies.

Session 1 – DEI: Building a Foundation

Thursday, Oct. 27 from 10 – 11:30 a.m.

The first workshop offers a foundation for defining diversity, equity and inclusion, along with the unconscious obstacles to meaningful DEI.

Session 2 – DEI: Creating a Strategy

Thursday, Nov. 3 from 10 – 11:30 a.m.

The second workshop provides actionable strategies to creating a DEI-focused work environment.

INSTRUCTOR: Darcel Madkins, PNC-Certified Women's Business Advocate

FEE: \$35 for one session or \$60 for both sessions

Current Questions About Compensation

Friday, Oct. 28 from 10 – 11 a.m.

Like all employers, nonprofit organizations have struggled to keep up with the myriad changes in employment. Are we in a Great Resignation? Is your pipeline robust? What are you thinking about the role of compensation and benefits in your HR strategy? Join this panel to hear the perspective of an HR specialist and a seasoned Executive Director who has recently conducted a thorough examination of all things human resources.

PANELISTS: Peggy Morrison Outon (moderator), Bayer and Covestro Centers; Don Lodge, ESC; Jim Guffey, South Hills Interfaith Movement

FEE: Free, but R.S.V.P. is required

BoardsWork! Board Member Virtual Training

Tuesdays, Nov. 1 and 8 from 9 a.m. – noon

The last few years have shown us that we need each other and we rely on nonprofits in our community to protect our health, serve our children, feed families, retrain people for new careers, etc. Nonprofits need great board members to get their work done and make this community safer, stronger and more vibrant. We need YOU to be a leader in the community to bring your skills! After this 2-day course we can match you to a nonprofit you are passionate about.

We've transformed *BoardsWork!* into an online training hub, packed with resources and information to help equip individuals as smart, innovative and eager nonprofit board members. The fresh, updated course will be presented over two sessions and filled with synchronous and asynchronous modules on topics like fundraising, boardsmanship, planning, finances, human resources, and diversity, equity and inclusion. *BoardsWork!* participants will lead and grow through:

- ★ Solving community challenges in a resource-constrained environment
- ★ Facilitating meetings with disparate points of view
- ★ Leading more confidently
- ★ Making difficult values-driven decisions

The nonprofit organizations become stronger with new, diverse individuals and skill sets. And businesses become stronger when employees become social leaders and advocates in the community.

INSTRUCTORS: Peggy Outon and Yvonne VanHaitsma, Bayer & Covestro Centers and guests

Fee: \$650 (\$400 without matching)

NONPROFIT MANAGEMENT CLASSES

Fundraising Diversification

Tuesday, Nov. 1 from 10 – 11:30 a.m.

Sustainable fundraising starts with a diversified funding portfolio. Your nonprofit needs multiple funding sources to keep it reliably afloat and to help you achieve your goals. Nonprofits know that there are things out of our control, but many organizations forget to plan for them financially. If you want to learn how to improve your nonprofit’s funding mix, join Emma Gilmore Kieran of Pilot Peak Consulting for a tutorial on how to evaluate your current funding and prepare for diversification for the future.

INSTRUCTOR: Emma Kieran, Pilot Peak Consulting

FEE: \$35

The Fundamentals of Board Membership

Wednesday, Nov. 2 from 10 – 11:30 a.m.

This basic-level course on board member roles and responsibilities will cover the most important functions of a board and how the members can keep their focus. We’ll discuss how board members can avoid getting into areas that staff should handle. Most of all, we’ll address questions you have about your board and organization. Bring your questions and expect a lively interchange of ideas.

INSTRUCTOR: Don Block, ESC

FEE: \$35

The State of Employment Law in 2022: What Every Nonprofit and HR Professional Should Know About Changes and Trends in Employment and Labor Laws

Wednesday, Nov. 2 from 1 – 2 p.m.

From the Great Resignation to remote work issues and a surge in unionization at the country’s largest employers (think Amazon and Starbucks), employment law has seen unprecedented shifts in the way employees work and what they value and prioritize when looking for employment. Government agencies are also more active than in recent years and are collaborating and coordinating their enforcement efforts. Kate Koop Irwin, employment and labor attorney at Frost Brown Todd, LLC, will discuss all this and more in an informative and engaging employment and labor law update.

INSTRUCTOR: Katherine (Kate) Koop Irwin, Esq., Frost Brown Todd LLC

FEE: \$30

What’s New on the Fundraising Horizon

Friday, Nov. 4 from 10 – 11 a.m.

Join a robust discussion on how to explore some new ways of thinking about FR. Have you started accepting crypto currency? How much money are you raising from donor advised funds? Our expert panelists will talk with us to unpack the power and potential of these two newer ways of fundraising.

PANELISTS: Peggy Morrison Outon (moderator); Patrick Schmitt, FreeWill; Annette Calgaro, BNY Mellon

Fee: \$30

Volunteer Engagement Strategy

Wednesday, Nov. 9 from 10 – 11:30 a.m.

Volunteers are essential to nonprofits. They are an extension of the organization’s mission ingrained in everything from day-to-day activities to major fundraising efforts. We’ll explore trends in volunteer management; strategies for engaging, reengaging and retaining volunteers; and auditing and expanding current volunteer offerings to appeal to new and evolving volunteers.

INSTRUCTOR: Sarah McMullen, University of Pittsburgh

FEE: \$35

Program Design Primer

Thursday, Nov.10 from 10 – 11:30 a.m.

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

INSTRUCTOR: Jon Hoffmann, Hoffmann Consulting

FEE: \$35

NONPROFIT MANAGEMENT CLASSES

Mastering Time Management

Tuesday, Nov. 15 from 10 a.m. – noon

Shorter deadlines, competing priorities, countless meetings and unscheduled interruptions are some of the challenges we face today. Without a natural drive for accomplishment, some of us feel especially pressed to produce results. This online session will help participants increase an achievement-oriented work style and obtain greater results with less stress. Topics include:

- ★ Attitudes and beliefs – developing an achievement motivation
- ★ Setting goals – focusing on results, not just activities
- ★ Establishing priorities – putting first things first
- ★ Planning and scheduling – deciding what to do and when
- ★ Procrastination – learning to just do it

INSTRUCTOR: Tom Sullivan, ProGrowth Associates LLC

FEE: \$40

The Five Campaign Essentials: How to Ensure Your Capital Campaign is a Success

Tuesday, Nov. 15 from 1 – 2 p.m.

A capital campaign can be exciting, transformational and fun (yes...fun!) for your organization. It can also be daunting. How can you avoid the pitfalls and plan for success? Focus on the five campaign essentials. This webinar will explore the five elements that are at the core of every successful campaign, along with real world examples of highlights, lowlights, do's and don'ts to help you achieve your big vision.

INSTRUCTOR: Lizz Helmsen, Carter Global

FEE: \$30

Changing the Narrative: Ethical Digital Storytelling for Mission-Driven Organizations

Wednesday, Nov. 16 from 10 – 11 a.m.

As a nonprofit professional, you understand firsthand how your work impacts individuals, families and communities and the incomparable feeling of serving others. But how do you share these powerful emotions with your most crucial audiences? With the right tools and strategy, you can be a master digital storyteller while honoring the humanity of those you serve. Join us as we explore best practices in narrative digital storytelling from both

a practical and ethical perspective. You'll leave with a greater understanding of how to optimize digital storytelling with limited resources, how to leverage digital storytelling for greater organizational outcomes, and ensure your storytelling approach is diverse, equitable and inclusive.

INSTRUCTOR: Laura Ruschak, Robert Morris University

FEE: \$30

Leadership and Career Development with Carlos Carter

Friday, November 18 from 10 – 11 a.m.

At this session we welcome Carlos Carter, the newly selected President and CEO of the Urban League to talk about his own career path and his recommendations to others as they build an effective career in the nonprofit world. We'll ask for his thoughts on retention and encouraging staff in these tumultuous times. Join us!

CONVERSATIONALISTS: Peggy Morrison Outon, Bayer and Covestro Centers; Carlos T. Carter, President and CEO, Urban League

FEE: \$10

Leveraging Logic Models: Identifying, Collecting and Using Data to Improve Your Program

Tuesday, Nov. 29 from 10 – 11 a.m.

This workshop introduces nonprofit professionals to key factors in collecting, managing and understanding program data through tools like a developing a logic model, using existing data and creating a data dictionary. Most important, we'll consider ideas that ensure that your program and its stakeholders use your program data. You'll learn how to:

- ★ Identify core questions these data are intended to address
- ★ Identify sources of data – both finding existing sources and developing additional sources
- ★ Discuss ways to utilize data to make meaningful program improvements

INSTRUCTORS: Victoria Frank & Rekha Shukla, Marigold Evaluations, LLC

FEE: \$30

NONPROFIT MANAGEMENT CLASSES

Growing Your Small Nonprofit

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

Join this fun and interactive class that will give you achievable steps to grow your agency. Hear from 2020 Small Agency of the Year winner (Laurel Region) on how they succeeded and grew their funding, team and programming during such a challenging time.

INSTRUCTOR: Stephanie Babich Mihleder, Big Brothers Big Sisters of the Laurel Region

FEE: \$35

Effectively Managing Legal Requirements Associated with Employee Medical Issues

Wednesday, Nov. 30 from 1 – 4 p.m.

This session will focus on the workplace laws that govern how employers must respond to employee medical concerns. Topics covered will include leaves of absence under the FMLA, ADA and local leave laws, the reasonable accommodation process, appropriate medical inquiries and exams, and the current state of Pennsylvania’s medical marijuana law.

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

FEE: \$65

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

Executive Director Boot Camp

Thursday, Dec. 1 from 9 a.m. – 4 p.m.

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

INSTRUCTOR: Wendy Burtner, Wendy Burtner Consulting/ Nonprofit SideKick!

FEE: \$125

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

NONPROFIT MANAGEMENT CLINICS

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

Bylaws Clinic

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

Employee Handbook Review (2-hour minimum)

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

HR Clinic

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

Marketing Clinic

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

Nonprofit Start-up Clinic (2-hour minimum)

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

NOTE: ALL CLASSES ARE ZOOM SESSIONS UNLESS OTHERWISE NOTED. 

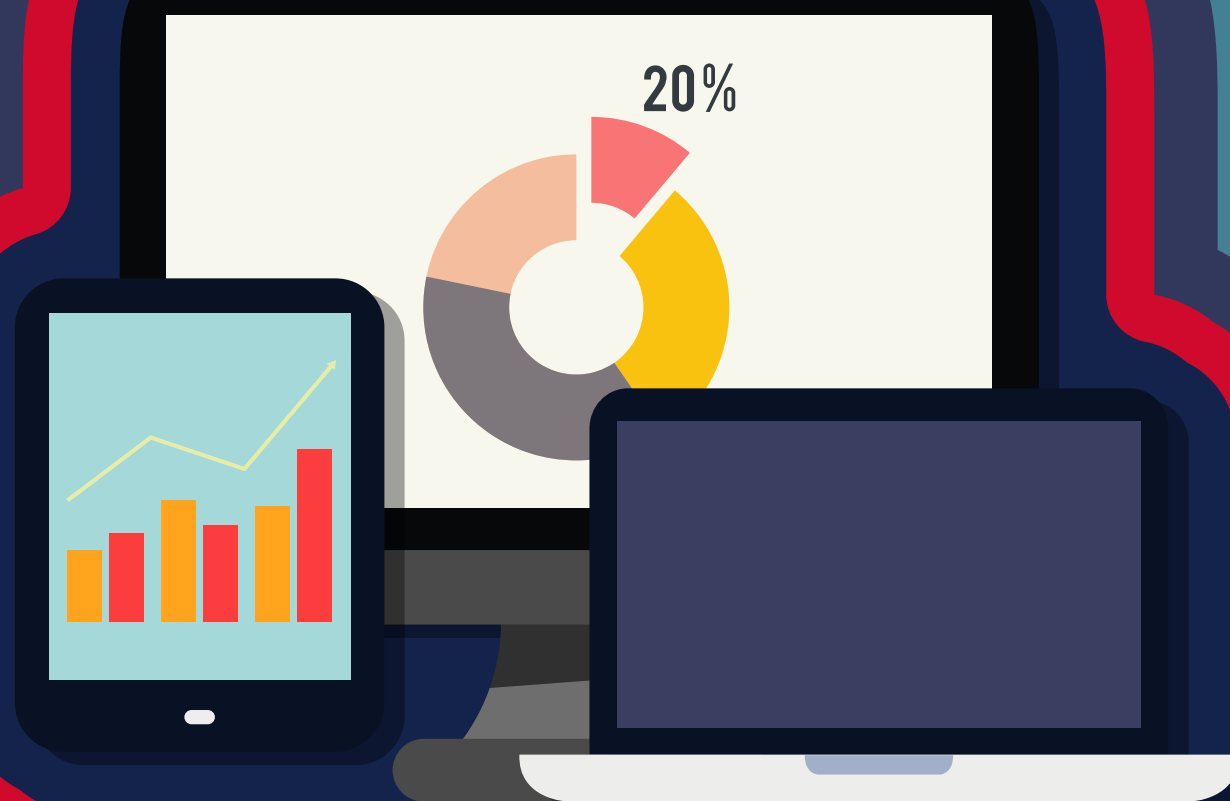


**BAYER CENTER FOR
NONPROFIT MANAGEMENT**

RMU.EDU/BCNM

TECHNOLOGY

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



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TECHNOLOGY CLASSES

Designing QuickBooks for Nonprofits

Tuesday, Oct. 11 from 1 – 3 p.m.

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

INSTRUCTOR: Melanie Rutan, Bookminders

FEE: \$40 or \$65 for both QuickBooks classes

Mining QuickBooks for Nonprofits

Tuesday, Oct. 25 from 1 – 3 p.m.

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

INSTRUCTOR: Melanie Rutan, Bookminders

FEE: \$40 or \$65 for both QuickBooks classes

PLEASE NOTE: *The instructor will be showing how to create reports using QuickBooks Desktop. The principals are the same when creating reports in QuickBooks Online, but there will be slight differences in screen view.*

Creating Accessible Social Media

Wednesday, Oct. 19 from 10 – 11 a.m.

Online communication is more important than ever! Your brand’s online presence, through websites and social media, shapes how the community interacts with your services and perceives your mission and vision. This course will tackle how to make your social media channels more accessible and how doing so can improve your search engine optimization (SEO). Walk-through demonstrations will include the when, how and why of accessibility through text, images and video on the major social media platforms.

INSTRUCTOR: Chris Mielo, ACHIEVA

FEE: \$30

How to Create Social Media Content for Your Nonprofit

Thursday, Nov. 17 from 10 – 11 a.m.

Have you ever found yourself getting “writer’s block” when trying to figure out what to post on social media? This course takes an in-depth look at what the best practices are when managing social media pages for a nonprofit organization. We will delve into what type of content to post using specific examples, how to maximize social media efforts based on the nonprofit’s audience, why it’s important to be active on social media, how to get started with TikToks/Instagram Reels and more.

INSTRUCTOR: Paul Novelli, Robert Morris University

FEE: \$30

Advanced Excel

Thursday, Dec. 15 from 9 a.m. – 4 p.m.

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

INSTRUCTOR: Matt Cohan, American Advisors Group

FEE: \$125

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

NOTE: ALL CLASSES ARE ZOOM SESSIONS UNLESS OTHERWISE NOTED. 



BAYER CENTER FOR NONPROFIT MANAGEMENT

STAFF

Peggy Morrison Outon is the founding Executive Director of the Bayer Center for Nonprofit Management at RMU, and now serves as Assistant Vice President for Community Engagement and Leadership Development at Robert Morris University. She is also the founding Director of the Centers for Effective Nonprofit Management in Austin, Texas, and New Orleans, and the founding board chair of the Alliance for Nonprofit Management. A nationally noted consultant, fundraiser, and trainer, Peggy has worked with more than 1,000 nonprofit clients and with the help of many people, helped organizations raise in excess of \$40 million. She served as founding member of the Drucker Foundation's international training team and as a trainer. She has been an active community volunteer, serving on 33 community boards and countless committees. In August 2006, she was named to the national *Nonprofit Times Top 50 for Power and Influence*. Peggy has been also recognized locally by several organizations, including the Girl Scouts, Pittsburgh City Council, was named by the *Pittsburgh Business Times* as a *2020 Woman of Influence*, and received a *Lifetime Achievement Award* from GPNP in 2021.

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

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

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



COVESTRO CENTER FOR COMMUNITY ENGAGEMENT

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

INSTRUCTOR BIOS

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

Leslie Bachurski serves as a Quality Assurance Analyst and Scrum Master for her team at Truefit, a Pittsburgh-based software product development consultancy. In these two roles, she ensures that the software works while also looking after the health and functioning of the team. Leslie is well-versed in completing project deliverables on time and within budget as she demonstrated in her 16 years with a local nonprofit agency. She has successfully transferred these skills to a career in software development where she utilizes her critical thinking skills, problem solving, and planning and organization skills to support her team in building quality software products.

Don Block is an ESC volunteer with the Bayer Center, and recently retired Executive Director of Literacy Pittsburgh where he worked since 1984. He has extensive experience in working with boards and fundraising, including capital campaigns. At Literacy Pittsburgh, private giving increased significantly in the past few years, thanks to the close partnership between staff and board. Under his leadership, Literacy Pittsburgh received the Wishart Award for Excellence in Nonprofit Management and he was honored as the Outstanding Administrator of Adult Education in the nation. Don holds a master's degree from Indiana University, Bloomington, and has served in the Peace Corps.

Wendy Burtner is a nonprofit leader, trusted advisor and consultant. She has more than 25 years experience leading organizations through transitions and building strong foundations for growth. Wendy has a wide range of experience across the nonprofit sector including time as a member of the start-up team at GuideStar and leadership roles in health and human services, corporate philanthropy, and arts administration. She is the CEO of Wendy Burtner Consulting and the founder of Nonprofit SideKick, an online community for nonprofit leaders to learn, grow and connect.

Annette Calgaro, Senior Director, Endowments and Foundations, oversees the administrative and investment services provided to BNY Mellon Wealth Management's nonprofit clients. Annette specializes in the administrative, reporting, fiduciary, and compliance needs of a client base that includes endowments; private, family, and community foundations; and planned giving clients. She earned a degree in economics from Chatham College and a juris doctor from the Duquesne University School of Law. Annette is the treasurer of the Chatham University Board of Trustees, serving on the audit, investment and advancement committees. She also served as co-chair of the University's successful \$100 million capital campaign.

Carlos T. Carter is President & CEO of the Urban League of Greater Pittsburgh. Previously, he was the Executive Director of Homeless Children's Education Fund, a consultant for Holy Family institute/Nazareth Prep and held roles in the banking industry for more than 16 years. He is a motivational speaker, blogger and published author, "Greatness Awaits You! 23 Ways to Unlock the Greatness Within" His accolades include: 2022 Power of Diversity Black 100 the 2019 Lead Now Pittsburgh Fellowship, Pittsburgh Magazine 40 under 40 Award, National Diversity Multicultural Leadership Award, and New Pittsburgh Courier Man of Excellence Award. He earned his M.B.A. from Robert Morris University.

Matt Cohan works as an IT Manager for American Advisors Group (AAG), a financial services company that delivers products to make retirement easier for older Americans. Matt has worked in IT since earning his Bachelor of Science in Management Information Systems from Edinboro University in 2007. Matt enjoys hitting the gym, golfing, going to the movies, and visiting his family in Eastern Pennsylvania in his spare time.

Chris Cooke, is CEO of Cooke Consulting, focused on strategic and operational planning, board development, succession planning, and risk management. He has served as a consultant and executive coach with the Bayer Center, The Forbes Funds, and New Sun Rising, among others, and as an instructor for numerous classes and an Advisory Board Member for the Bayer Center. Previously, he was the Executive Director of PULSE where he developed the small nonprofit from a single person operation to a team of seven staff and a budget about \$1 million with 85% earned revenue. Chris has served on several boards and is the recipient of the City of Pittsburgh's Citizen Service Award.

Kevin Erdner stands at the nexus of his two greatest passions and fascinations: Leadership and Innovation. With 20+ years of product and team development experience, Kevin currently finds his purpose operating within the healthcare industry, traveling the world to build leading innovations that make a positive difference in patients' lives. Kevin has studied and performed improvisational comedy throughout Pittsburgh, and has applied improvisational comedy techniques in various programs including those designed to build confidence in upcoming high school students. Kevin received his B.S. in Business Administration with an emphasis in information technology from Duquesne University, where he returned to obtain a Master's of Organizational Leadership (summa cum laude).

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

Jeff Forster is a Product Owner on a software development team at Truefit, a Pittsburgh-based software product development consultancy. He serves as the bridge between the client and the development team, helping the client to identify and prioritize requirements and helping the team understand those requirements within the client's business domain, objectives, and constraints. Prior to Truefit, Jeff had a long tenure at the Bayer Center supporting nonprofits in technology services and presentations and storytelling.

Victoria Frank holds a Ph.D. in social welfare and a master's in public affairs from the University of Wisconsin – Madison. Tora was a fellow in the U.S. Department of Education's Pre-Doctoral Training Program in Education Sciences and currently is a lecturer at the University of Wisconsin Madison, teaching courses in social policy and poverty. She is partner at Marigold Evaluation, LLC with more than 15 years of evaluation experience using both qualitative and quantitative methods to evaluate social and educational programs.

INSTRUCTOR BIOS

Brett Fulesday has more than 18 years of experience in providing business valuation and litigation-support services for individuals as well as public and privately held, early-stage and mature companies. Driven by the desires to help and to continue to learn, Brett pours his energy and effort into the areas – for-profit and nonprofit alike – of arts, education, entrepreneurship and emerging technology.

Angela Garcia is the Executive Director of Global Links, a Pittsburgh-based organization that works to improve health for vulnerable communities, locally and globally. She serves on the advisory boards of the Bayer Center for Nonprofit Management, Adagio Health, Latin American Cultural Center, Pittsburgh-Matanzas Sister Cities Partnership, and Pittsburgh Labor Council for Latin American Advancement. She has been recognized for her leadership by the Pittsburgh Business Times, Pittsburgh Human Resources Association, Pittsburgh Magazine and Cribs for Kids. She lives with her husband and children in Emsworth and enjoys all things Pittsburgh, especially biking, kayaking and exploring the local food scene.

Jim Guffey joined South Hills Interfaith Movement (SHIM) in 2006 as its first Director of Development and Public Relations. In 2007 Jim became the Executive Director and is responsible for the day-to-day operation of all aspects of SHIM as well as working with the Board of Directors to facilitate the strategic direction of the organization. A graduate of Robert Morris University, Jim has over 30 years of experience working for notable nonprofits, including the American Heart Association and the United Way of Allegheny County (now United Way of Southwestern Pennsylvania).

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

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

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

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

Yvonne Hudson, director of advancement at Sojourner House, is a principal of New Place Collaborations. She directed higher education communications for Carnegie Mellon, Chatham, New York Law, Yeshiva University, and University of Pittsburgh Theatre Arts. Her work in New York, DC, and Pittsburgh includes projects for the Bayer Center for Nonprofit Management and its clients, Crisis Center North, OnStage Pittsburgh, Quantum Theatre, the Kelly-Strayhorn, and Shakespeare organizations including The Folger, The Shakespeare Society, and Pittsburgh Shakespeare in the Parks. A journalism/psychology alumna of Point Park University, Yvonne earned an M.A. in arts management and developed her solo show, Mrs Shakespeare, at Pitt.

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

Katherine Koop Irwin, Esq., is an employment and labor law attorney, professional speaker and corporate trainer. She has represented, counseled and helped employers, business owners, HR professionals, in-house attorneys and managerial employees on how to avoid employment law issues and lawsuits while focusing on their business goals. She regularly advises employers on all facets of the employer-employee relationship, including discrimination and retaliation claims, requests for accommodations and leave, reports of harassment, and wage and hour compliance. She also serves clients in traditional areas of labor law, including negotiating collective bargaining agreements, handling grievance and arbitration matters, and defending employers before the National Labor Relations Board.

Don Lodge is a Senior Business Consultant at Duquesne University's Small Business Development Center. He advises entrepreneurs starting businesses as well as business owners who want to grow their companies. For over 20 years, he has been a business consultant to small business owners. Before that, his regular day jobs were director-level positions in human resources, especially compensation and benefits, at large organizations like Westinghouse, Mercy Hospital, UPMC, and K & L Gates. He also taught graduate courses at Duquesne, Carnegie Mellon, and La Roche Universities for over 30 years.

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

INSTRUCTOR BIOS

Darcel Madkins is a Vendor Relationship Risk Specialist for The PNC Financial Services Group, Inc. Previously, Darcel was the Pittsburgh Market Diversity & Inclusion Liaison and served as the President of African American Employee Business Resource Group (AA EBRG) at PNC Bank and was CEO of the nonprofit Umoja African Arts Company. She is Co-Founder of African American Leadership Association and Founder of African American Leadership Foundation which serve to promote, develop, and recognize the network of African American leaders. She serves on the boards for the Pittsburgh Zoo & PPG Aquarium, Legacy Community Options for All People and Committee Advisory Council 90.5 WESA/91.3 WYEP. She is an alumnus of Coro Center for Civic Leadership's Women in Leadership class of XV and Leadership Pittsburgh, Inc. class of XXIX.

Sarah McMullen, M.B.A. joined the Executive Service Corps in 2018 and is currently the Director Senior Leadership Projects at the University of Pittsburgh. She has worked for Pittsburgh nonprofits and education organizations for over 20 years specializing in the areas of event management, program and resource development, project management, volunteer management, marketing, user experience enhancement, and strategic partnerships. Sarah holds a B.A. from Westminster College and an M.B.A. in Nonprofit Management from Marylhurst University. She serves as the secretary of the board for the North Hills Art Center and is a board member and chair of the Development/Fundraising committee for the Pittsburgh Schweitzer Fellows Program (PSFP). She is also a fiber artist and participates in independent shows and community-based fiber art projects.

Chris Mielo is the Communications Manager at Achieva, where he develops content to share the important work Achieva does in the community for families and people with disabilities, and manages their three brands across 12 social media channels. He has developed videos for the North Side Steelers Youth Athletic Association, The Pittsburgh Steelwheelers, DON Services, Pennsylvania's Technical

Training Assistance Network (PaTTAN), PA's Office of Vocational Rehabilitation, and done player photos for The Miracle League through Pittsburgh Pirates Charities. He has a B.A. in media arts from Robert Morris University's TV/Video Production program.

Stephanie Mihleder is Executive Director of Big Brothers Big Sisters of the Laurel Region (and a proud Big Sister). She worked closely with hundreds of nonprofits during her years as the Lead Community Service Representative for BNY Mellon Global Philanthropy. She earned her B.S. in Communications Media from IUP and holds certifications in Diversity, Equity, and Inclusion and Boards of Directors. She has been named by the Community Foundation of Westmoreland County as one of the top 10 female nonprofit leaders in Westmoreland County and Big Brothers Big Sisters of the Laurel Region, won Agency of the Year during her second year of tenure.

Kara D. Mostowy, M.S., CFRE, GPC has extensive experience in fundraising for human services and educational organizations. She has raised more than \$30 million in support of nonprofits over her career, with extensive experience in special events, capital campaigns, grants, corporate giving, major and planned gifts. She enjoys sharing her experience with colleagues through the Association of Fundraising Professionals, Grant Professionals Association and Planned Giving Council. She holds the CFRE and GPC credentials. Kara was honored as the Outstanding Fundraising Executive in 2012 by the Western PA Chapter of AFP. She is a graduate of Leadership Pittsburgh.

Paul Novelli is the Social Media Coordinator at Robert Morris University. He graduated from the University of Pittsburgh in the spring of 2018 with Bachelor's degrees in Rhetoric & Communication and Film & Media Studies. Prior to joining RMU, Paul managed and created a variety of social media accounts for TWO MEN AND A TRUCK – Pittsburgh, the Black Sheep and La Roche University's athletic department.

His creative skills include photography, videography, editing, social media management, writing and knowledge of the Adobe Creative Suite.

Michele O'Leary is a CPA and a Principal in the Pittsburgh office of Zelenkofske Axelrod. Michele has over 25 years of experience in public accounting and has specialized in the Public Sector for 15 of those years. She provides auditing, accounting and consulting services to Public Sector clients. In addition to her professional work with nonprofits, Michele volunteers at several organizations and currently serves as the finance committee chair for the YMCA of Greater Pittsburgh, board member for Contemporary Craft, and advisory board member for Deer Valley YMCA Family Camp. Michele holds a B.S. in accounting from Indiana University of Pennsylvania.

Jack Owen, Founding Member of Owen Law Group, LLC is a tax lawyer with extensive expertise representing a broad range of clients, including tax-exempt charities, businesses and individuals in tax, business law, nonprofit, estates – trusts and planned giving. The Executive Service Corps of Western Pennsylvania named Jack the "Outstanding Volunteer Attorney for 2004" for pro bono legal services. He also received the "Allied Professional of the Year" award in 2005 from the Pittsburgh Planned Giving Council. Based on an evaluation process of his peers, Jack is AV-Rated by Martindale-Hubbell and a Pennsylvania Super Lawyer.

Dr. Jo Ellen Parker is a former college president and museum executive with extensive fundraising experience. As President and CEO of Carnegie Museums of Pittsburgh, she oversaw the successful campaign to expand the Carnegie Science Center. And as a long-time educator, she loves sharing information to help nonprofit leaders and their organizations thrive.

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

Maria Satira is an award-winning communications professional and author with experience in journalism, public relations, and nonprofit marketing. She spent nearly 10 years as a local news anchor, later moving into nonprofit communications for an economic development organization. She founded Maria Satira Media, LLC and wrote the book, "An Introduction to Media Relations for Nonprofit Organizations," to help nonprofits achieve their media relations and communications goals. Originally from Pittsburgh, she holds a bachelor's degree with majors in media arts and communication from Robert Morris University. She now lives in Greenville, North Carolina with her husband and their two rescue dogs.

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

INSTRUCTOR BIOS

Rekha Shukla has more than 30 years of development and management experience gained in public and nonprofit organizations in Asia, New York and Pittsburgh. She holds a Master of International Affairs Degree from Columbia University. Rekha is a partner at Marigold Evaluation, LLC concentrating in evaluation, project development, and strategic planning.

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

Chris Thyberg understands the challenge of leading effectively in complexity and how vital it is for leaders to have a partner in their professional and personal growth. After 30+ years in leadership at Carnegie Mellon, Penn State and a global nonprofit, Chris now offers executive coaching to emerging and experienced leaders in all sectors. Since 1987, Chris and his family have lived in East Liberty, shared in its gains and losses, and take hope from rising community leaders. To serve the common good fuels his passion to support purpose-minded leaders who empower and sustain resilient organizations committed to our shared flourishing. You can find Chris at [LinkedIn.com/in/christhyberg](https://www.linkedin.com/in/christhyberg).

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

Michaela Kizershot White is a Gift Officer at The Pittsburgh Symphony, where she works with individuals in accomplishing their philanthropic goals as related to the symphony's mission. Michaela has held roles in the arts and education sector. She studied violin performance and music education at Northwestern University and later received her Masters of Arts Management from Carnegie Mellon University. A thread throughout her career is building opportunities to deepen one's connection to what they care about most. Michaela values the use of data-driven strategy and she can often be found running in Pittsburgh's neighborhoods as she trains for marathons.

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

APPLIED RESEARCH AT THE BAYER CENTER

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

Wage & Benefit Survey

When you're setting salaries, the Wage & Benefit Survey for Southwestern PA Nonprofit Organizations is the only comprehensive guide in our region. This invaluable tool gives you all the information you need to comply with IRS requirements for setting compensation packages, to remain competitive in your own retention and succession planning, and to develop organization-wide salary charts.

As we prepare to gather data for the 2023 edition, the cost of the 2021 survey will be reduced to \$100 for nonprofits with budgets under \$2 million, and \$150 for nonprofits with budgets over \$2 million. Once purchased, the research can be shared with anyone within your organization. Nonprofits who participate in the survey receive the results for free. For more information about how to purchase your copy, visit <https://www.rmu.edu/about/bcnm/programs-services/research-publications>.

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



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

WHAT NOW?

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

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

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The Bayer Center is a member
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COURSE REGISTRATION

[illegible]

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

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Withdrawal and Refund Policy

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

Cancellation Policy

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

Scholarships

A limited number of partial scholarships are available to organizations demonstrating significant budget restraints. For more information, call **412-397-6000** or email **bcnm@rmu.edu**.

Please Note

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

NOTE: ALL CLASSES ARE ZOOM SESSIONS UNLESS OTHERWISE NOTED. 📍