spring 2015
course catalog

"I know the price of success: dedication, hard work, and an unremitting devotion to the things you want to see happen."

Frank Lloyd Wright

RMU
Letter from the Executive Director

I hope this catalog finds you still basking in the glow of wonderful winter holidays! My real hope is that each of you had some time to re-charge your batteries, show and receive love from those who mean the most to you and that you are entering 2015 with optimism and a renewed sense of purpose. You are the primary assets of your organizations without whom missions would not be met, goals would go unrealized and the world would be much the poorer... I say all this knowing that for most of us... at least part of the time, the holiday festivities mean a third shift of responsibility, not a time for renewal. But regardless, the New Year is always a time of promise, tired or rested!

2015 is the fifteenth anniversary of the Bayer Center’s work and service. Because we never miss the chance to celebrate, we’re going to do it all year! We’re also going to take some time to reflect on what we have accomplished, what is yet to do and think about ourselves like we encourage our clients to think when they do strategy work.

One thing we always do in planning is to draw the You Are Here Map. We look at the history of the organization, what has shaped them, who has been important to their progress and what is going on around them to which they responded.

I moved to Pittsburgh in August 1999 and did 166 interviews in the first six months I lived here. I asked about leadership, about use of technology, about issues facing nonprofits and where they got help with management and governance challenges. There were seventeen nonprofit management programs at universities and in the nonprofit community... not to mention some very fine for-profit firms that consulted with nonprofits. Our challenge was to enhance, complement and innovate in a crowded space. This dilemma is one with which I am sure many of you are familiar.

Here are some things that were true in early 2000 as we planned. Many of my interviewees warned me not to refer to NPOs as businesses and marketing was a dirty word! There was a big conference on nonprofit collaboration and mergers. My friend, Al Condeluci, was himself in 40 coalitions! Everybody was talking about it! The funding community had begun to insist on better financials as a key indicator of organizational health... everybody was talking about it! Many of my interviewees told me their 401(k)s were looking pretty sweet and they were considering early retirement. We were looking at a wave of retirements... everybody was talking about it! Individual giving was a very minor part of most NPOs fundraising strategies... too labor intensive for a development department of one or fewer FTEs. The people I interviewed lamented the lack of corporate involvement with most NPOs. Our own research showed that 32% of local NPOs had high speed internet. Faxes were common tools and dial-up access on individual machines was the norm. Google had just been born and Robert Morris was still a College!

Flash forward fifteen years... grant requests and grant reports are now online. Days of Giving, Ice Bucket Challenges and Giving Tuesdays have brought new donors and less labor-intensive fundraising, but it remains very challenging to compete for the donor’s dollars now that values driven financial choices are not only contributions to your favorite charity, but also political donations and crowd funding your friend’s new business. We have all worked to professionalize the sector. Mission accomplished there... now the conversation has moved to preserving the soul of the sector. Storytelling that marries statistics to explicit improved circumstances of those we serve... stories that touch our hearts and heads rule. Cross-sector collaboration, engaging business people fully, using their expertise and our own is a daily occurrence. The Mayor’s Office has a full time liaison with nonprofits because Mayor Peduto has long been an ally of community groups. Now, everybody’s talking about millennials and their phenomenal energy because like or not, that wave of retirements which has failed thus far to materialize can’t be too far off with Boomers turning 65 at the rate of 10,000 a day!

So what do you need from your management support organization? Can BCNM stop doing some things on which we currently spend time to make space for “What’s Next?” We’re thinking about it and we would love to hear from you as we think... focus groups and e-surveys are in our future—yippee!

I never thought I’d be at the Bayer Center for fifteen years. I have loved my work because of you. The need to be relevant and to deliver useful service is a constant challenge and joy. Our BCNM team is another source of joy and optimism for me. We’re still getting up every day in hopes that we can truly help you be successful. That is the one thing I know will never change for us, but how we do that is always under review... and that is especially true in this our fifteenth year!

Excelsior, dear ones!

Peggy Morrison Outon

The Bayer Center for Nonprofit Management at Robert Morris University
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"The Bayer Center is better than sliced bread in my opinion."

~Sr. Janice Fulmer, Executive Director, The Community at Holy Family Manor

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Wage and Benefit Survey

The Wage & Benefit Survey of Southwestern Pennsylvania Nonprofit Organizations has been a trusted resource since 2000. It has provided the most current data about regional salary and benefits needed, both for valid decision-making by nonprofit executives and for 990 compliance. We have a comprehensive record of the progress made by our nonprofit employees in salary and benefits over the last fourteen years. Your willingness to provide information has made this sector-wide resource possible. Additionally, it sparked the 74% Pay Equity conversation resulting in greater equity for women and men in the regional nonprofit sector.

The newest 2015 version is available for purchase by contacting Carrie Richards at 412-397-6008 or richardsc@rmu.edu. Cost is $100 for nonprofits who participated in the survey, and $250 for nonprofits who did not participate.

Note: All classes are located at the Bayer Center for Nonprofit Management located in the Heinz 57 Center at 339 Sixth Avenue, Suite 750, unless noted otherwise.
The Bayer Center for Nonprofit Management at Robert Morris University

Not like anybody else.

We’re part of a university. We live the nonprofit life. We give you the time you need…

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

Every one of our solutions is a custom solution.

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

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

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

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

Your reality is our reality.

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

In fifteen years of service to the nonprofit community, the Bayer Center has completed over 1,500 consulting engagements and educated over 8,500 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
- Increased partnerships and strategic alliances
- More effective approaches to fundraising
- Better informed, evidence-based decisions for future directions
- More capable nonprofit leaders and organizations
- Effective management information systems
- Heightened brand awareness
- Prudent software choices and website design
- A strategic approach to decision-making

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

Back to Nature: An Executive Director’s Retreat
Friday, March 27 – Saturday, March 28
from noon on Friday to 11 a.m. Saturday

We constantly talk about a nonprofit executive director’s need to wear many hats, but seldom do these nonprofit servants get a chance to hang up their hats and take a deep breath. Come with us to Crestfield Camp and Conference Center for an overnight stay and breathe deep! This retreat for executive directors will explore staff management, board governance, fundraising and financial management through planned curriculum, group discussion, activities and fellowship. Tenured executive directors, those new to the ED position and everyone in-between are welcome to attend. Space is limited, so register today! Lodging and meals are included in the price.

Instructor: Peggy Morrison Outon, Bayer Center
Location: Camp Crestfield, Slippery Rock, PA
Fee: $225 for double occupancy room, $275 for single occupancy room (includes meals and lodging)

The Great Debate
Tuesday, April 14 from 5:30 – 8 p.m.

In 2015, we are going to celebrate Equal Pay Day with our first-ever fundraiser for the 74% Project. It takes until April 14 every year before women begin to earn the same dollars as a man for their work. To underscore this truth, we will formally ask: Women in Southwestern Pennsylvania who are employed by nonprofit organizations have been able to more fully realize their potential in the last 15 years than in the previous 50. Yes? No?

The audience will vote on the proposition prior to and post-debate. We will depend on our debaters – local and national advocates for women – to inform and provoke more expansive thought. Price includes two drink tickets and heavy hors d’oeuvres before the debate. Will you be persuaded one way or the other? Come find out!

Ticket Cost: $74
Location: The Twentieth Century Club, Oakland

74% - seventy-four percent

Women comprise a great majority of the nonprofit workforce in Southwestern Pennsylvania. In fact, 74% of those working in the regional nonprofit sector are female. Approximately 225,000 of the 300,000 employed in nonprofits in Allegheny and surrounding counties are women.

Wage equity, however, is not a reality for most women working in regional nonprofit organizations.

We have distilled our areas of focus into three key questions we continue to explore today:

1. How can we assure young professional women have opportunity for increased responsibilities and leadership roles?
2. How are older nonprofit professional women going to re-tool their careers and eventually retire with dignity?
3. How can we strengthen the board of directors sense of responsibility to their employees? (74% has developed the tool 7 Key Questions for Board Members to help!)

Please visit our 74% Website at seventyfourpercent.wordpress.com to read more about this exciting project!

On behalf of women in the nonprofit workforce, the Bayer Center for Nonprofit Management at Robert Morris University is leading the way to promote change in this picture through research and education. In order to continue our multi-faceted research on this topic through education, we offer these classes and events which will speak to the on-the-ground reality faced by both women and men in the nonprofit sector.

- The Great Debate (Page 5)
- The Power of Negotiation (Page 12)
- Employee Compensation and Benefits (Page 12)
Preparing for a Smooth Audit
Wednesday, Jan. 21 from 9 a.m. – noon
It's audit time, but there's no reason to panic. There's a lot you can do to prepare for smooth sailing for your staff and auditor. You'll learn the best ways to prepare for your audit including closing out your books, gathering the needed documentation ahead of time, and choosing an auditor. We'll also discuss strategies for maximizing your relationship with your auditor to make the process easier and more productive.

Instructors: Tom Ryan, HRRCPA; Evie Gardner, Bayer Center
Fee: $65 ($55 if paid online)

Demystifying Financial Statements
Tuesday, March 24 from 9 a.m. – noon
Nonprofit accounting has its own unique language. In this overview for people with little knowledge of financial statements, we'll introduce you to accounting terminology and how to read your nonprofit's financial statements. We'll also look at revenue recognition rules, as well as nonprofit performance measures. This session will consist of a 2 hour curriculum, with the final hour set aside for one-on-one questions about your own financial statements, so bring them along!

Instructor: Pam Falkner, Bookminders
Fee: $65 ($55 if paid online)

Bookkeeping Basics
Wednesday, April 29 from 9 a.m. – noon
Come and learn the mechanics of nonprofit accounting, including bookkeeping terminology, accounting principles, and basic internal controls. A working demonstration will be provided on how to keep track of your finances using a spreadsheet bookkeeping system, and you’ll leave with an electronic copy of the reference materials as well as a spreadsheet bookkeeping template. Note: As a spreadsheet tracking system is not acceptable for use during an audit, this class is designed for small nonprofits who do not require an annual audit.

Instructors: Pam Falkner, Bookminders; Evie Gardner, Bayer Center
Fee: $65 ($55 if paid online)

Prepping for an Audit Clinic
60-minute sessions available by appointment
Do the words financial audit make the hair on the back of your neck rise? Work with one of our volunteers to help make sure you’re tracking your finances well, walk through the audit process, and gather required documentation long before the auditors arrive.

Instructor: John Eichenlaub, ESC Volunteer
Fee: $50 per hour (due to the complexity of this topic, a 2-hour minimum is required.)
Planned Giving: The Basics
Thursday, May 7 from 9 a.m. – noon

Fundraisers are often fearful of the technical and legal details of planned gifts and leery of talking to donors about a gift that involves their death. Fear not! In this session, 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. Follow up this class with Planned Giving: Beyond the Basics.

Instructor: Maureen Mahoney Hill, CFRE
Fee: $65 ($55 if paid online) per session OR $100 for the whole day (includes lunch)

Planned Giving: Beyond the Basics
Thursday, May 7 from 1 – 4 p.m.

Are you and your board ready to move beyond bequests? We’ll explore more complex types of planned gifts and learn the advantages of each from the perspective of the donor and the charity. Best practice strategies for gift acceptance policies will be incorporated into the review of gift planning vehicles. Techniques for marketing and outreach will be shared, and participants will learn (and practice!) how to talk to their donors about planned gifts. This course is designed as a companion course to Planned Giving: The Basics.

Instructor: Maureen Mahoney Hill, CFRE
Fee: $65 ($55 if paid online) per session OR $100 for the whole day (includes lunch)

LawLinks

The Bayer Center for Nonprofit Management is partnering with the Allegheny County Bar Association & the Pro-Bono Partnership to provide legal assistance to local nonprofits. Please note that the Bayer Center provides a referral service, not direct legal advice, nor can we offer assistance in cases that involve litigation.

To be eligible for LawLinks, your organization must:
- Be a registered 501(c)3 nonprofit
- Have a budget of less than $1 million
- Reside in Allegheny County

Questions most frequently revolve around human resources, real estate, taxation, tax-exempt status, bylaws and document review. There is a $50 application fee for this program. To pay your fee, please register for LawLinks at www.rmu.edu/bcnmregistration. Email questions to Carrie Richards at richardsc@rmu.edu.

For groups seeking to incorporate and/or obtain 501(c)(3) tax exemption, please call the Bayer Center at 412-397-6000 to speak with a start-up counselor.

LawLinks

Executive Service Corps (ESC)

ESC is a group of talented, dedicated professionals who help nonprofits design targeted solutions to their challenges and opportunities. ESC’s low-cost tactical answers for discrete problems complement the more comprehensive consulting services of the Bayer Center’s in-house staff.

ESC volunteers are carefully selected and trained by the Bayer Center, with all of their projects centrally administered at BCNM. Some volunteers are still working and many are retired, but all of them are committed to nonprofits and your success.

Some of the areas in which our ESC volunteers can assist you are:
- Marketing and Communications Planning
- Human Resources
- Facilities Management
- Accounting Systems and QuickBooks
- Outcomes Management and Quality Improvement
- Project Management
- Strategies for Emerging Organizations

For more information on ESC programs at the Bayer Center, contact ESC Program Director, Yvonne Van Haitsma at 412-397-6002 or vanhaitsma@rmu.edu.

“Wonderful to not only have subject matter experts in HR, legal, etc., but kind-hearted people that are willing to share their time and talent to make your organization and the nonprofit sector better.”

~Chris Cooke, Executive Director, PULSE
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.

FUNdamentals of Project Management
Thursday, Jan. 22 from 9 a.m. – noon
If you’re new to project management, this is the class for you! We’ll learn the basics of project management, including project planning steps, developing project objectives and managing a project team.

Instructor: Cindy Leonard, Bayer Center
Fee: $65 ($55 if paid online)

BoardsWork! Board Member Training
Wednesday, Feb. 4 from 8:30 a.m. – 4:30 p.m. OR
Wednesday, May 13 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 gambit of nonprofit governance including boardsmanship, fundraising, financial oversight, planning and technology.

Instructor: Peggy Morrison Outon, Bayer Center
Fee: $425 per session (includes lunch)

Got Diversity?
Thursday, Feb. 5 from 1 – 4 p.m.
Many nonprofits struggle to ensure racial and other kinds of diversity on their boards. This class explores structural and cultural challenges to diversifying, as well as best practices for designing boards more reflective of their communities. Come to share your experiences with diversity efforts, exchange information, and ask specific questions. Leave with concrete ideas for change.

Instructors: Anupama Jain, Inclusant; panelists TBA
Fee: $65 ($55 if paid online)

The Nuts and Bolts of Capital Campaigns
Thursday, Feb. 12 from 9 a.m. – noon
Capital campaigns seemingly have just as many nuts and bolts as the buildings they fund. Coordinating the realities of a campaign with the realities of construction requires a partnership among knowledgeable staff, enthusiastic volunteers and donors who believe in your mission. This session will include a look at the nuts and bolts of capital campaigns and the partnerships that support their success.

Instructors: Mike Tarle and Joe Tavella, Massaro Corporation; Janet Emery, J. Emery Consulting, Inc.
Fee: $65 ($55 if paid online)
Creating a Development Plan:
Let Your Compass Be Your Guide
Tuesday, Feb. 17 from 9 a.m. – noon
With a New Year in full swing, it’s important to have a development plan in place to serve as a compass to guide you throughout the rest of the year. In this session you’ll learn how to use a development audit, a goals setting tool and an assessment tool to better understand the probability of gifts to be received. We’ll also discuss the importance of diversification of revenues and how to use the development plan as a way to engage board members in raising more money.

Instructor: Peggy Morrison Outon, Bayer Center
Fee: $65 ($55 if paid online)

HR Roundtables
Wednesday, Feb. 18 and May 20 from 8 – 9:30 a.m.
The HR job can be a lonely one – thank goodness there’s strength in numbers. You need peers to challenge, listen, develop and encourage you. The HR Roundtable is just that. Every meeting, the group discusses a topic with both insight from a trainer, and time afterward to discuss and help each other work through issues your organization is facing.

Fee: $10 per session
Location: Urban Impact Foundation

Presentation Day

Effective Presentations
Thursday, Feb. 19 from 9 a.m. – noon
A narrative that lacks a human touch or a lack of audience interaction can contribute to wandering attention. We’ll focus on planning and executing a presentation to maximize your audience’s level of knowledge and interest in your topic and discuss the optimal blend of facts and stories that will make your presentations memorable. Stick around for the afternoon session on how to use PowerPoint to make those newly improved presentations sing!

Instructor: Jeff Forster, Bayer Center

Presentation Visuals that Work
Thursday, Feb. 19 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 online) per session OR $100 for the whole day (includes lunch)

Supervisors as Leaders Series

Communication Styles:
Building a Productive Team
Wednesday, Feb. 18 from 9 a.m. – noon
We don’t do things purposely to drive people crazy ... but we may annoy others because we behave differently than they do. Learn key strategies for building a productive team by communicating with staff with different personality types based on your own style of leadership. We’ll look at the four different characteristics of communication styles and how to leverage your style for productive interactions with your team.

Instructor: Alice Warfield, ESC Volunteer

Leading Through and Encouraging Change
Wednesday, Feb. 25 from 9 a.m. – noon
Leaders control and anticipate change while managers cope with complex issues in operations relating to change. Both leadership qualities that can be learned, improved and even perfected, which is important as markets evolve and new technologies emerge. For nonprofits working to achieve mission and vision, this means developing skills in evolving variations of supervisor/subordinate relations, diverse work-place environments, and establishing expectations that promote harmony and culture. We’ll look at the types and challenges of change that nonprofits face and offer possible solutions for successful and effective change.

Instructor: Anthony Petropy, Robert Morris University

From Vision to Reality:
How to Develop and Articulate Your Vision
Wednesday, March 25 from 1 – 4 p.m.
Great leaders look forward to the future. Their articulated vision of the future pulls their nonprofit teams forward. In this session, we will help you begin to describe and write out your version of the future of your organization or the future of the department of the nonprofit you lead. We will discuss the value of engaging others in that vision and how to show your team members how their long term interests can be realized by joining hands and enlisting in your common vision.

Instructor: Len Pentrancosta, Peak Performance Management

Fee: $65 ($55 if paid online) per session OR $150 for all three sessions in the series
Tools to Build a Better Board

Thursday, Feb. 26 from 9 – 10:30 a.m.

A high-functioning board is a pearl of great price for every nonprofit ... in 2015, make yours one that works! Come with your questions about:

- What skills and talents do you need for your board?
- How can we build the most productive working relationship between Chair and CEO/ED?
- How can board meetings have impact and results?
- Is there some way we can increase follow-through on promises made at those meetings?

The BoardsWork! program can help solve these and many other governance challenges, so we will tell you all about that as well!

Instructors: Peggy Outon, Lulu Orr and Evie Gardner, Bayer Center

Fee: $10

Advocacy 2.0: New Approaches for the 21st Century

Tuesday, March 3 from 1 – 4 p.m.

Few nonprofits have the time, capacity or money to play the old "get a lobbyist to schmooze for you," approach ... and they shouldn't do it anyway. With today's technology, political environment, and the strengths of many nonprofits' causes, there are other more efficient and effective ways to move an issue or advance a cause with elected leaders. Learn how nonprofits can leverage their work, consumers, donors, board members and the public at large to be their own "lobbyist."

Instructor: John Denny, Denny Civic Solutions

Fee: $65 ($55 if paid online)

The Board’s Report Card

Wednesday, March 4 from 9 a.m. – noon

Is it possible to evaluate your board without insulting them? You bet it is, and is a healthy exercise to keep your board functioning at the highest level. This interactive class will help you look at yourselves both as a group, and as individuals, starting with board job descriptions to provide a starting point for evaluation. We’ll share various types of assessments so you can create what is best for your own board.

Instructors: Don Block, Greater Pittsburgh Literacy Council; Lulu Orr, Bayer Center

Fee: $65 ($55 if paid online)

Presenting to a Funder

Thursday, March 5 from 9 a.m. – noon

Although presentations of any kind can make us nervous, presenting to a funder creates a special kind of anxiety. That's all the more reason to hone material (what you’re going to say, your packaging, your visuals and the documents you’ll leave with the funder) for maximum impact. This class will drill down from general principles about presenting effectively to focus on presenting effectively when enlisting money from a funder.

Instructors: Peggy Outon and Jeff Forster, Bayer Center

Fee: $65 ($55 if paid online)

Featured Series

On three Fridays in March, the Bayer Center will bring in some of our region’s top nonprofit allies in the foundation community, media and city government. Come listen, ask questions and hold meaningful conversations with people who care about our work and success!

Working with Our Media Allies

Friday, March 13 from 9 – 11 a.m.

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

Panelists: Tracy Certo, NextPittsburgh; Diana Nelson Jones, Pittsburgh Post-Gazette; Rachel Jones, Whirl Magazine

Moderator: Peggy Outon, Bayer Center

Working with Our Foundation Allies

Friday, March 20 from 10 a.m. – noon

Generous gifts from foundations have often secured the future for regional nonprofits. But there are 7,500 nonprofits in southwestern Pennsylvania alone, and foundation leaders have to make hard choices and are challenged to make every dollar count. Come reflect with three of our region’s most thoughtful foundation leaders about how they make those decisions.

Panelists: Max King, Pittsburgh Foundation; Fred Thieman, The Buhl Foundation; Michele Cooper, McAuley Ministries

Moderator: Peggy Outon, Bayer Center

New Friends in City Government

Friday, March 27 from 9 – 11 a.m.

A strong partnership between government and the nonprofit sector is crucial. Nonprofits often serve as government partners, and the government’s policies and support is integral to our nonprofits’ ability to meet human needs. Bring your questions to this lively conversation with our government allies.

Panelists: Leigh Halverson and Grant Ervin, Office of Mayor William Peduto; Meg Cheever, Pittsburgh Parks Conservancy

Moderator: Peggy Outon, Bayer Center

Fee: $40 per session ($30 if paid online) OR $75 for all three!
Get Integrated: Marketing Mix Matters  
*Wednesday, March 11 from 9 a.m. – noon*

Make smart marketing matches while integrating your nonprofit brand throughout promotion. When you are proactive rather than reactive, you’ll better articulate the messages your audiences need to hear. Yes, there are enough hours in the day and tools that match your resources even when your budget is tight. This workshop connects the dots among PR, social media, paid promotion, events, and direct mail.

**Instructor:** Yvonne Hudson, New Place Collaborations  
**Fee:** $65 ($55 if paid online)

Fundraising for Boards  
*Wednesday, March 18 from 9 a.m. – noon*

This interactive seminar will explore the inherent tension in any nonprofit between board and staff roles and offer thoughtful insights about why each stakeholder must understand and accept his or her clearly defined role. We’ll provide practical tips on how to communicate clearly between board and staff about this central and challenging issue. Open to staff or board members…but most effective when an agency can send both!

**Instructor:** Janet Emery, J. Emery Consulting, Inc.  
**Fee:** $65 ($55 if paid online)

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 life. In short, our coaches can help you achieve one of the most precious gifts of all — a more effective organization and a peaceful night’s sleep!

Coaches don’t tell you what to do. They help you draw on your own natural wisdom to make better decisions from a place of clarity and confidence. For more information on affordable coaching at the Bayer Center, please contact Carrie Richards at 412-397-6008 or richardsc@rmu.edu.

“Coaching is a wonderful tool and experience. It provided much needed assistance to work through thorny topics.”

—Wanda Wilson, Executive Director, Oakland Planning and Development Corp.

Strategic Planning: A Must in Turbulent Times  
*Friday, March 31 from 9 a.m. – 4 p.m.*

An inspiring vision and carrying out a solid plan is vital for any nonprofit, large or small. With everyone’s time at a premium, creating the right strategic planning process makes all the difference. This full-day workshop provides an in-depth introduction to strategic planning and a deep delve into stakeholder engagement: a critical success factor in shaping and implementing successful strategic plans.

A fast-paced introductory overview sets the stage for understanding effective strategic planning. Content includes:

- The key components for a great process and effective plan
- Guided discussion to zero in on your organization’s aims for strategic planning
- Options for choosing the right approach for your organization
- Clarification of roles for board members, staff and consultants
- An experiential strategic plan “launch” that produces energy and open minds
- Tips for keeping a plan real and alive over time

Then a deeper dive into stakeholder engagement, including:

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

**Instructor:** Gary Stern, Stern Consulting International  
**Fee:** $125 ($115 if paid online) and includes lunch

How to Manage a For-Profit Subsidiary of a Nonprofit Organization  
*Tuesday, April 7 from 1 – 4 p.m.*

Revenue generation continues to draw significant attention in the nonprofit sector. Rather than rely exclusively on donations, many nonprofits seek to become self-sustaining through the creation of for-profit subsidiaries. This seminar examines:

- How to evaluate whether to create a for-profit subsidiary
- Legal and accounting issues in setting up a for-profit subsidiary
- “Cultural” issues in integrating the for-profit subsidiary with the parent, nonprofit organization
- Day-to-day management of a for-profit subsidiary

**Instructors:** Mike Johnson, Pat Ripple, Dick Evans, Judy Edwards, Dick Mautz and Ed Levy of the Canton Chapter of SCORE  
**Fee:** $85 ($55 if paid online)
Time Management: Techniques, Tips and Tricks  
*Thursday, April 9 from 9 a.m. – noon*

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

**Instructor:** Cindy Leonard, Bayer Center  
**Fee:** $65 ($55 if paid online)

Between Stuffing Envelopes and Board Service:  
Finding a Niche for High-Skilled Volunteers  
*Friday, April 10 from 9 – 10:30 a.m.*

When nonprofits know how to use them well, high-skilled volunteers bring a wealth of expertise to your nonprofit. Learn how to carve out specific projects, provide enough guidance and support, and create mutual accountability. When the experience is satisfying and meaningful to the volunteer, they are more likely to repeat good work. We will also mention where to find skilled volunteers, but will primarily focus on how to use them well.

**Instructor:** Dorothy Hufford, ESC Volunteer  
**Fee:** $10

Employee Compensation and Benefits  
*Friday, April 17 from 9 a.m. – noon*

Make sure that your employees are receiving the most equitable and cost-effective compensation and benefits available to them. This session will cover the mechanics of setting up a wage or salary structure from the basics of job descriptions through position evaluations and the establishment of competitive compensation ranges. We will also provide participants with the tools they need to organize an employee benefit package which maximizes the dollars that they can afford to spend.

**Instructors:** Ray Frankoski and Cherly Melinchak, ESC Volunteers  
**Fee:** $65 ($55 if paid online)

The Power of Negotiation  
*Monday, April 20 from 1 – 4 p.m.*

Research has documented the power of effective negotiation, yet many individuals – especially women – don’t do it. Why is that? Because we don’t know how! Learn negotiation principles through both practice and application that can help you create critical advantage both personally and professionally.

**Instructor:** Peggy Morrison Outon, Bayer Center  
**Fee:** $65 ($55 if paid online)

Getting and Keeping the Best Employees  
*Wednesday, April 22 from 9 a.m. – noon*

Finding the best employees has become more challenging with changing technology, government regulations, labor laws and demographics, not to mention competing with for-profits with bigger payroll budgets. This program will focus on recruiting, selecting, hiring and on-boarding employees using the latest tips and techniques. We’ll cover the total process, from determining your need to integrating the new employee into your organization. We’ll also talk about using social media to recruit and the legal challenges in recruiting and hiring.

**Instructor:** Phyllis G. Hartman, PGHR Consulting, Inc.  
**Fee:** $65 ($55 if paid online)

Preparing for the Coming Seismic Shift in Nonprofit Giving  
*Tuesday, April 28 from 9 a.m. – noon*

Much has been made of the fact that baby boomers are entering new stages of life, and the “slacktivist” millennials may be our best donor prospects for the future. This session will review data about individual giving and delve into the characteristics of five generations that need to be on the radar of nonprofit fundraisers, and ideas about what changes an organization can make to be as responsive as possible.

**Instructor:** Jeff Forster, Bayer Center for Nonprofit Management  
**Fee:** $65 ($55 if paid online)

The 10 Most Common HR Mistakes Nonprofits Make  
*Thursday, April 23 from 9 a.m. – noon*

Nonprofits face unique HR challenges in times of financial strain, staffing shortages, increased government oversight and ever-changing regulations. We’ll look at both HR theory and practice through lecture, case studies, real-world examples, class discussion and interactive role-playing. Content includes: how we hire, pay, evaluate, promote, discipline, reward, provide benefits, record keep, settle disputes between employees, assign work, monitor social media and other technology use and control the workplace environment.

**Instructor:** Albert Lee, Esq., Tucker Arensberg, PC.  
**Fee:** $65 ($55 if paid online)

So You Wanna Be a 501(c)3?  
*Thursday, May 14 from 5 – 8 p.m.*

Setting up a nonprofit is a tricky and costly process that involves more than creating your website, opening your doors to clients and fundraising. Learn about the incorporation process and alternatives that may be more appropriate, as well as nonprofit governance issues, reporting requirements and other legal and management issues. You’ll leave this class with information, homework and a template to guide you through the next steps.

**Instructors:** Jeff Fromknecht, Side Project; Bob Moll, ESC Volunteer  
**Fee:** $65 ($55 if paid online)
Nonprofit Management Clinics

Bylaws Clinic
60-minute sessions available by appointment
Bylaws are important in directing the board and the organization. Due to recent changes in the 990 legislation, many nonprofits' bylaws are not in compliance with best practices. During this clinic, we will review your bylaws, give you suggestions for improvements, and guide you on how to discuss these with your board.

Instructor: Sue McLaughlin, ESC Volunteer
Fee: $50 per hour (2-hour minimum required)

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

Instructor: Ray Frankoski, ESC Volunteer
Fee: $50 per hour (2-hour minimum required)

HR Clinic
60-minute sessions available by appointment
Do your HR policies need updating? Is expansion requiring more staff and more new job descriptions? Are you facing layoffs, or do you have a pregnant staffer and no maternity policy? We can help you with these and other issues including:

- Creating better performance appraisals
- Improving employee relations
- Restructuring benefits and compensation

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

Instructor: Ray Frankoski, ESC Volunteer
Fee: $50 per hour

Marketing Clinic
60-minute sessions available by appointment
In this clinic, we’ll review your current marketing strategy and materials, and give you advice about where you should focus your energy to align with your mission, customers, and needs.

Instructor: Dorothy Hufford, ESC Volunteer
Fee: $50 per hour

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

Instructors: ESC Volunteers
Fee: $50 per hour (2-hour minimum is required)

PinPoint Planning™ Clinic
60-minute sessions available by appointment
Know you need to improve in a specific area? This clinic provides executives and boards with a quick analysis of critical operations and specific recommendations for improvement. You can choose from: finances and financial management, fundraising, human resources, legal issues, governance and technology. Each PinPoint Planning™ tool is a type of audit that will take organizations about an hour to complete and return. The Bayer Center will assign an ESC volunteer or LawLinks attorney from the relevant field to review your materials and then meet with you one on one for a working session. During your face-to-face meeting, you’ll receive concrete, actionable suggestions to enhance your current operations.

This program was developed by the Bayer Center for Nonprofit Management in partnership with the United Way of Allegheny County.

Instructors: ESC Volunteers
Fee: $50 per hour

Presentation 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 per hour

Storytelling Clinic
60-minute sessions available by appointment
Stories that capture the essence of your organization’s mission can be powerful tools for enlisting support. If you know that your organization does great work but you lack those two or three stories that help to explain it to outsiders, come work on your stories with one-on-one structured help. Although storytelling is a creative act, all good stories have specific ingredients. An outsider to serve as guide and first audience can hone your stories into compelling tools in your communication strategy. Note: This clinic – unlike the others – may be done by phone if travel proves inconvenient.

Instructor: Jeff Forster, Bayer Center
Fee: $50 per hour
Bagels and Bytes
Join your nonprofit techie colleagues for informal learning and networking in this popular monthly convening. If you’re officially (or unofficially) responsible for your nonprofit’s technology challenges, join us! Visit http://tinyurl.com/bcnmbagelsandbytes for the B&B calendar.

Bagels and Bytes – Allegheny
FREE, but you must R.S.V.P. to Shelby Gracey at gracey@rmu.edu or 412-397-6000.

- Wednesday, February 4 from 8:30 – 10 a.m.
  at Children’s Museum of Pittsburgh, 10 Children’s Way, Pittsburgh, PA 15212
  (Park in Museum lot, vouchers will be available at front desk.)
- Wednesday, March 11 from 8:30 – 10 a.m.
  at Children’s Museum of Pittsburgh, 10 Children’s Way, Pittsburgh, PA 15212
  (Park in Museum lot, vouchers will be available at front desk.)
- Wednesday, April 1 from 8:30 – 10 a.m.
  at Frick Art and Historical Center (Haller House building), 7227 Reynolds St, Pittsburgh, PA 15208
  (Free parking in the Center’s lot.)
- Wednesday, May 6 from 8:30 – 10 a.m.
  at Frick Art and Historical Center (Haller House building), 7227 Reynolds St, Pittsburgh, PA 15208
  (Free parking in the Center’s lot.)

Bagels and Bytes – Westmoreland
Breakfast cost is individual responsibility. R.S.V.P. to Gina McGrath at ginam@ywcawestmoreland.org or 724-834-9390 x107.

- Tuesday, January 13 from 8 – 9:30 a.m.
  Location TBA, Greensburg
- Tuesday, March 10 from 8 – 9:30 a.m.
  Location TBA, Greensburg
- Tuesday, May 12 from 8 – 9:30 a.m.
  Location TBA, Greensburg

Choosing or Changing Your Fundraising Software
Tuesday, Feb. 10 from 9 – 11 a.m.
Don’t make a mistake! Choose fundraising software that’s right for your organization. We help you figure out what you really need and what you can do without. Then we point you in a direction that won’t break the bank or your database.

Instructor: Jeff Forster, Bayer Center
Fee: $40 ($30 if paid online)
Excel Day

Introduction to Excel 2010
Tuesday, Feb. 24 from 9 a.m. – noon
Learn Excel basics in the morning session including:
- Worksheet creation
- Formula creation
- Cell formatting using “mouse pointers”
- Absolute cell references
- Printing your worksheet

Instructor: Cindy Leonard, Bayer Center

Intermediate Excel 2010
Tuesday, Feb. 24 from 1 – 4 p.m.
Learn more about Excel in the afternoon including:
- Worksheet templates creation and use
- Using functions
- Creating links between worksheets
- Database features
- Chart creation and formatting

Instructor: Jeff Forster, Bayer Center

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

Website Planning for Nonprofits
Thursday, March 12 from 9 a.m. – noon
Planning a website starts before the first line of code is written. If you want a new site or to re-design your current site, it’s easier when you know website planning basics. Whether you are creating a DIY website in-house or hiring an outside designer, this class will help you refine your vision first. Topics include:
- Identify and define your target audience
- Select and refine website objectives
- Plan your site navigation and features
- Choose the right look and feel

Instructor: Cindy Leonard, Bayer Center
Fee: $65 ($55 if paid online)

Advanced Excel
Tuesday, March 17 from 9 a.m. – noon
The deeper you go into Excel, the more directions your can pursue. By popular demand, we’ve added an Advanced Excel class 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.

Instructor: Jeff Forster, Bayer Center
Fee: $65 ($55 if paid online)

Writing for the Web and Social Media
Thursday, March 19 from 9 a.m. – 4 p.m.
Writing content for your website or social media is very different from writing for other types of communications because of the way people read and use the Web. Learn how to improve your written website and social media content, increase your site’s usability as well as readability and improve the effectiveness of your online communication channels.

Instructor: Cindy Leonard, Bayer Center
Fee: $125 ($115 if paid online) and includes lunch

DIY Websites with WordPress
Thursday, March 26 from 9 a.m. – 4 p.m.
Are you a website novice who needs to know how to design a basic website that works? WordPress is a website content management system that is great for building and managing websites, even for beginners. Nonprofit staff without previous web design experience and web design staff who want to learn WordPress are welcome.

Instructor: Cindy Leonard, Bayer Center
Fee: $125 ($115 if paid online) and includes lunch
PowerPoint Day!

**PowerPoint Skills and Secrets**  
*Thursday, April 16 from 9 a.m. – noon*

Get down to the nitty gritty of techniques for optimally using an existing PowerPoint presentation and how to create and edit PowerPoint files. In this hands-on class, you’ll learn how to add charts, graphics, photos and media clips in PowerPoint. You’ll also learn about formatting, using the different views available in PowerPoint and how to animate and transition between slides.

**Advanced PowerPoint**  
*Thursday, April 16 from 1 – 4 p.m.*

Even if you have created PowerPoint presentations from scratch or enhanced the presentations others have made, you may want to deepen your skills. Maybe you see other people do things you want to know how to do in PowerPoint. Or maybe you just feel like you need some additional skills to punch up your presentation visuals. You’ll learn to:

- Hyperlink from PowerPoint to web content
- Add audio to a presentation
- Create custom shows
- Insert Action Buttons
- Manage slide formatting through the Slide Master
- Manage handout formatting through the Handout Master

**Instructor:** Jeff Forster, Bayer Center  
**Fee:** $65 ($55 if paid online) per session OR $100 for both sessions (includes lunch)

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**Getting Started with Publisher 2010**  
*Thursday, April 30 from 9 a.m. – 4 p.m.*

Learn to use Microsoft Publisher 2010 to create your own publications such as flyers, posters, invitations and newsletters. We will start with the basics of the Publisher interface and work our way up to designing actual pieces for print. This class is for beginners or those who wish to refresh their skills.

**Instructor:** Cindy Leonard, Bayer Center  
**Fee:** $125 ($115 if paid online) and includes lunch

**Adobe Photoshop Essentials**  
*Thursday, May 14 from 9 a.m. – noon*

Adobe Photoshop has so many features it can feel a little daunting to use. In this introductory class, we’ll explain the Photoshop interface and tool sets and cover the features most often used in daily work (e.g., cropping, re-sizing, re-coloring). We’ll also look at other useful features such as adding text, using layers and touching up photos.

**Instructor:** Cindy Leonard, Bayer Center  
**Fee:** $65 ($55 if paid online)

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**Custom Training**

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

**Frequently requested topics include:**

- Technology  
- Nonprofit finance
- Board development  
- Fundraising
- Supervision and leadership  
- 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.
Technology Clinics

Does Your Website Work? Clinic
60-minute sessions available by appointment
Websites these days can become quickly outdated. Does your site still serve your organization’s needs? Our website expert will audit your site and provide an honest (but kind) assessment and recommend changes for improvement.

Instructor: Cindy Leonard, Bayer Center
Fee: $50 per hour

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 per hour

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 and are 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 networking tools (such as Twitter, Facebook, Google+ or YouTube), need help setting up a blog or a wiki, or need assistance with social media strategy, we can help.

Instructor: Cindy Leonard, Bayer Center
Fee: $50 per hour

WordPress or Dreamweaver Clinic
60-minute sessions available by appointment
Have a great idea for your website but no idea how to do it? Bring those WordPress or Dreamweaver challenges and questions to our expert, and we’ll help you create the site of your dreams! This clinic is designed to help you troubleshoot specific issues. Though users of all skill levels are welcome, you must have a basic knowledge of either WordPress or Dreamweaver prior to the clinic.

Instructor: Cindy Leonard, Bayer Center
Fee: $50 per hour

iPad or Android Clinic
60-minute sessions available by appointment
Do you have an iPad or Android tablet but haven’t done much with it yet? Get one-on-one help using the iPad/iOS or Android operating system, configuring your tablet and downloading/installing apps.

Instructor: Cindy Leonard, Bayer Center
Fee: $50 per hour

Custom Clinics
Looking for a clinic in something that’s not listed? We might be able to customize a clinic just for you! Call Carrie Richards at 412-397-6008 to inquire.

"I really enjoyed the presenter's relaxed but professional style. He was kind and knowledgeable. The open conversation with the other attendants was really wonderful."

~Ms. Lisa Viscusi, Volunteer, Bloomfield Development Corporation

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BoardsWork! (BW!) is a program of the Bayer Center for Nonprofit Management (BCNM) developed to enhance board governance within our region’s nonprofit sector.

BoardsWork! FOR NONPROFITS

As a BW! Award Agency, we can help your board clarify roles and responsibilities, sharpen strategic thinking and financial oversight, streamline policies and procedures and develop fundraising strategy.

New in 2015!

BoardsWork! for Nonprofits now has two program options – one that matches your agency with 1-2 new trained board members OR one that trains 2 of your current board members in our full-day BW! board member training.

Award Agency with new board member matching includes:

- An individualized governance assessment
- A customized, half-day board retreat
- Matching of 1-2 new, trained board members
- Usage of the BW! Award Agency Seal, and more!

Cost: $1,000

Award Agency with current board member training includes:

- An individualized governance assessment
- A customized, half-day board retreat
- Full day BW! training for 2 current board members
- Usage of the BW! Award Agency Seal, and more!

Cost: $1,500

Some of the improvement BW! Award Agencies have reported are:

- Our meetings have become more efficient and effective
- A more strategically focused structure of board meetings now allows for open discussion of the hard issues
- More engagement and support of the board in fundraising efforts and activities
- Using the board to raise money and awareness

“(BW!) gave me an insightful, concise and targeted view into what it takes to be an effective NPO board member.”

Matthew B. Weissberg, PNC Bank

BoardsWork! FOR BUSINESSES AND PROFESSIONALS

BW! is designed to enhance corporate and personal social responsibility by training service-minded personnel in effective nonprofit governance including board roles and responsibilities, financial oversight, fundraising and strategic planning. Other benefits include:

- One year of free nonprofit management classes at BCNM
- Customized matching to a BW! Award Agency board
- Invitations to exclusive BW! events
- Ongoing support from the BW! staff

Cost: $425 per person

Contact Program Director Lulu Orr at boardswork@rmu.edu to get started or to answer any questions you may have. Partial scholarships may be available for organizations who qualify, and flexible payment terms are always available.
Staff Bios

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, Peggy has worked with more than 700 nonprofit clients. 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 and has been recognized locally by several organizations, including the Girls Scouts and Pittsburgh City Council.

Jeff Forster is Senior Consultant at the Bayer Center for Nonprofit Management at Robert Morris University. For over a decade, Jeff has assisted a variety of nonprofit organizations in the Pittsburgh area, specializing in technology, presentations and storytelling. He holds a master’s degree in public policy and management from Carnegie Mellon University and a bachelor’s degree from Yale University. He serves on the Alumni Schools Committee and is president of the board of the Yalie Club of Pittsburgh and serves on the Stewardship Committee at Church of the Ascension, Oakland.

Evie Gardner is Consultant, Organizational Development and Finance at the Bayer Center for Nonprofit Management at Robert Morris University. Her nonprofit work experience with AmeriCorps, the Heinz Endowments and as a program evaluation consultant have given Evie an integrated and holistic approach as she provides nonprofits with the tools and know-how to use numbers to drive strategic decision-making. Evie holds a BA from the University of Wisconsin-Madison and a master’s degree in public administration at the University of Pittsburgh’s Graduate School of Public and International Affairs. On her days off, you may find her volunteering with Enroll America or A+ Schools, pedaling her bike, or hitting the tennis court.

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, directs the adult, children’s, youth, and handbell choirs.

Cindy Leonard is Consulting Team Leader at the Bayer Center for Nonprofit Management at Robert Morris University. She works with the consulting team to maximize client satisfaction and identify areas for growth. Additionally, she creates and teaches Bayer Center classes, convenes Bagels & Bytes meetings and organizes the annual TechNow conference. Cindy’s consulting specialty is helping nonprofits leverage technology to meet their missions. An experienced website designer, she adds website planning, design and assessment to BCNM’s portfolio of services. Cindy holds a B.S. in Computer Science, an M.B.A. and a M.Ed. in Instructional Design Technology, all from Seton Hill University.

David Taylor Little happily spends his evenings doing administrative work and greeting Robert Morris students and faculty at The Bayer Center. His days are spent as the Young Playwrights Workshop Coordinator in the education department of City Theatre Company. David received his MFA in theatre direction from The New School for Drama and has directed many plays, musicals and operas around the country. Some of his favorites include Wit at The Theatre Factory in Pittsburgh, Hansel and Gretel for Blue Lake Opera in Twin Lake, Michigan and O’Sullivan Stew in Catskill, New York.

Lulu Orr is Program Director of BoardsWork! at the Bayer Center for Nonprofit Management at Robert Morris University. As Founder and Executive Director of the Good Grief Center for Bereavement Support, she worked from the ground up in creating and running that organization for 10 years. Creating a Board of Advisors which transitioned into a Board of Directors, Lulu knows first-hand the importance of an educated and engaged board. She currently serves on the Board of Memory and Allegheny Cemetery and is an active member of the professional advisory board of Forbes Hospice.

Carrie Richards is Programs Team Leader at the Bayer Center for Nonprofit Management at Robert Morris University. She offers management support for all of the BCNM programs, including the development of and implementation of BCNM’s extensive nonprofit educational classes, clinics and convenings. A North Side resident and proud owner of a rescued pit bull, a volunteer for Biggies Bullies and a member of the Allegheny Elks Lodge #339. Carrie earned a degree in youth ministry from Eastern University, completed a master’s degree in nonprofit management and is currently pursuing a second master’s degree in human resources, both from Robert Morris University.

Carrie Tancrator is Consultant and Researcher 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 the 74% Project which explores the lives of women in the nonprofit sector. Carrie was a Schreyer’s Scholar at The Pennsylvania State University. She earned her master’s degree from the University of Delaware and is currently pursuing her doctorate at Robert Morris University. In addition to being an active board member and volunteer, Carrie is a marathoner and the proud parent to a sleep-less baby boy, Otto and a tail-less shelter cat, Rocky.

Yvonne Van Haitsma has been a Consultant at the Bayer Center for Nonprofit Management at Robert Morris University since 2000 and is the ESC Program Director. She has 15 years’ experience consulting with nonprofits in collaboration development, strategic planning, board development, and executive transitions both locally and in El Salvador and Ecuador. Yvonne earned her master’s degree in community organizing and nonprofit management at the University of Pittsburgh. She has consulted with many organizations including Girl Scouts Western Pennsylvania, YouthWorks, Inc., The Women and Girls Foundation, Pediatric Palliative Care Coalition, Fayette County Conservation District, and Metro Family Health Practice.
Instructor Bios

Don Block is Executive Director of Greater Pittsburgh Literacy Council (GPLC) where he has worked since 1984. He has extensive experience in working with boards and fundraising, including capital campaigns. At GPLC, private giving has increased significantly in the past few years thanks to the close partnership between staff and board. Under his leadership, GPLC 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.

Tracy Cerro is founding editor and publisher of NextPittsburgh. As the former publisher and editor of PopCity and former editor of AIA Pittsburgh’s Columns magazine, she has written about topics ranging from architecture and urban design to sustainability and economic development. A two-time boomeranger, she returned to Pittsburgh from Los Angeles where she worked in national media sales, with post-grad studies in writing and photography at UCLA. In June, 2009 she traveled to Turin, Italy and Essen, Germany as part of a German Marshall Fund trip to study the revitalization of the two regions that, like Pittsburgh, were nearly felled by single-industry decline.

John Denny has spent his career transforming ideas into action, playing a lead role in humanitarian, corporate, public affairs, and philanthropic initiatives including Pittsburgh Social Venture Partners, The Campaign for What Works, and The New Pittsburgh Collaborative. He has served as a special assistant and consultant to Elsie Hillman where his work spanned three decades and has involved leadership on a broad range of initiatives including director of community relations for the Hillman Company. John has been honored with the Sisters of Mercy in 2008, Michele was responsible for the start-up of the foundation, including establishing its strategic plan and developing its governance and grantmaking processes. She manages an annual grantmaking budget of $2.3 million and has awarded more than 250 grants with awards totaling over $9.8 million.

Ray Frankoski joined ESC as a volunteer in 2001 following his retirement as Director of Human Resources at Westinghouse Government & Environmental Services Company. In addition to serving as an ESC Project Manager, Ray has consulted with the Holy Family Institute; ALS Association, Western PA Chapter; Gwen’s Girls; A. Philip Randolph Institute, Community at Holy Family Manor, Pittsburgh Irish and Classical Theatre, Society for Contemporary Craft, Turtle Creek MH/MR and Ward HomeThe Mattress Factory; Parkinson Chapter of Greater Pittsburgh; and Peer Support and Advocacy Network (PSAN).

Janet C. Emery, CFRE, brings nearly 30 years of successful development experience to her consulting business, J. Emery Consulting, Inc., which supports nonprofit sustainability through wise and ethical development practices. Services assist volunteers, chief executives and development professionals charged with improving external relationships and philanthropic support for nonprofit organizations. Her experience in the arts, education, healthcare, and human services supports a documented track record of success, most notably in the development, communications, and volunteer management disciplines.

Grant Ervin is the Sustainability Manager for the City of Pittsburgh with 15 years’ experience intersecting the worlds of environmental, community and economic development and infrastructure policy to create innovative and sustainable solutions for local governments, community development organizations and state agencies. Prior to joining the city, Grant served as the regional director for 10,000 Friends of Pennsylvania, and as public policy manager for Pittsburgh Community Reinvestment Group. Ervin graduated with a bachelor’s degree in history and political science from Washington & Jefferson College, and a master’s degree from the University of Pittsburgh’s Graduate School of Public and International Affairs.

Janet C. Emery, CFRE, brings nearly 30 years of successful development experience to her consulting business, J. Emery Consulting, Inc., which supports nonprofit sustainability through wise and ethical development practices. Services assist volunteers, chief executives and development professionals charged with improving external relationships and philanthropic support for nonprofit organizations. Her experience in the arts, education, healthcare, and human services supports a documented track record of success, most notably in the development, communications, and volunteer management disciplines.

John E. Eichenlaub has been an ESC volunteer 2000 where specializes in financial planning, accounting and budgeting projects. He retired after spending the last 14 years of his career as Controller and CFO of Community College of Allegheny County. His work experience (which includes 7 years as a manager in the consulting practice of Price Waterhouse Coopers) centered on financial matters for both profit and nonprofit organizations. He holds a CPA certificate in the state of Pennsylvania.

Michele Rone Cooper is executive director of McCauley Ministries, the grantmaking arm of the Pittsburgh Mercy Health System. Established by the Sisters of Mercy in 2008, Michele was responsible for the start-up of the foundation, including establishing its strategic plan and developing its governance and grantmaking processes. She manages an annual grantmaking budget of $2.3 million and has awarded more than 250 grants with awards totaling over $9.8 million.

Pam Falkner is the Business Development Director for Bookminders, the premier provider of outsourced bookkeeping solutions. Half of their clients are nonprofit organizations. Pam’s original career was as an accountant, which is how she started at Bookminders. Her personality and understanding of human nature has led her to her current role. She often teaches seminars on financial subjects, especially those that deal with the nonprofit sector. Pam currently serves as Treasurer of Young Nonprofit Professionals Network, Pittsburgh. She is active in the nonprofit community, serving on boards and committees, especially those that involve her children.

Grant Ervin is the Sustainability Manager for the City of Pittsburgh with 15 years’ experience intersecting the worlds of environmental, community and economic development and infrastructure policy to create innovative and sustainable solutions for local governments, community development organizations and state agencies. Prior to joining the city, Grant served as the regional director for 10,000 Friends of Pennsylvania, and as public policy manager for Pittsburgh Community Reinvestment Group. Ervin graduated with a bachelor’s degree in history and political science from Washington & Jefferson College, and a master’s degree from the University of Pittsburgh’s Graduate School of Public and International Affairs.

Meg Cheever has served as the founding President and CEO of the Parks Conservancy for the last 15 years. Working with the administration of Mayor Tom Murphy, she initiated the public private partnership for parks jointly developed by the Parks Conservancy and the City and has been responsible for implementing and updating a strategic master plan for Pittsburgh’s four largest parks. Prior to founding the Pittsburgh Parks Conservancy, Meg spent 18 years at WQED, serving as General Counsel through 1991 and Publisher of Pittsburgh magazine from 1991–1997. She holds a Bachelor’s degree in the History of Art from Wellesley College and a law degree from Boston University School of Law.

John Murphy, she initiated the public private partnership for parks jointly developed by the Parks Conservancy and the City and has been responsible for implementing and updating a strategic master plan for Pittsburgh’s four largest parks. Prior to founding the Pittsburgh Parks Conservancy, Meg spent 18 years at WQED, serving as General Counsel through 1991 and Publisher of Pittsburgh magazine from 1991–1997. She holds a Bachelor’s degree in the History of Art from Wellesley College and a law degree from Boston University School of Law.

Jeff Fromknecht is the President and Chief Executive Officer of Side Project Inc. He has more than 10 years of experience working at nonprofit organizations in a variety of direct service and administrative roles. Most recently, Jeff worked as a community partner at United Cerebral Palsy of Pittsburgh, where he developed and evaluated programs designed to help people with disabilities to build social capital. Jeff holds graduate degrees in both social work and law, is licensed to practice law in Florida and Pennsylvania, and has been admitted to practice before the United States Tax Courts throughout the country.
Leigh Halverson is Deputy Chief of Staff for Economic Development, Office of Mayor William Peduto. Previously, she worked for The Pittsburgh Foundation where she was involved with the first Day of Giving, meeting with more than 800 nonprofits to create online profiles to qualify for inclusion. After attending the 2011 One Young World Summit in Zurich as one of 30 Pittsburgh delegates, she helped host the 2012 summit here and restructured the gathering to include 20 breakout groups throughout the city. She has a master of science in public policy and management from Carnegie Mellon University, and was named one of Pittsburgh’s “40 under 40” in 2013.

Phyllis G. Hartman, SPHR, the founder and President of PGHR Consulting, Inc. has 25+ years in HR. A speaker on recruiting, workforce development and other HR and business topics, Phyllis is a member of the SHRM Ethics Expert Panel and the Government Advocacy Team. She has an MS in HRM, La Roche College and is a certified Senior Professional in HR. Phyllis has written 2 books, “Looking to Hire an HR Leader?” and “Never Get Lost Again: Navigating Your HR Career.” She teaches at LaRoche and is Vice Chair of the Board of Trustees of the Homeless Children’s Education Fund.

Yvonne Hudson, principal of New Place Collaborations, is a versatile marketing/PR expert who creates mission-driven solutions for nonprofits and businesses. She directed communications on the campuses of Carnegie Mellon, Chatham, New York Law, Yeshiva University, and University of Pittsburgh Theatre Arts. She has worked with many nonprofits including Opera Theater Summerfest, Mission Vision, Financial Planning Association, Pittsburgh Symphony, and Three Rivers Shakespeare Festival. Yvonne earned an MA in arts management and developed her solo show Mrs Shakespeare at Pitt. A journalism and psychology alumna of Point Park University, Yvonne is founder/director of Poets Corner Arts.

Dorothy T. Hufford specializes in marketing program design, communications strategies and budget development/fundraising. Dorothy has served as the principal in Hufford & Associates, worked as a Manager for Latrobe Area Hospital and Director of Marketing/Community Relations for Excela Health. She has also been on the faculty of Seton Hill College and the Community College of Allegheny County. Dorothy’s efforts have resulted in securing grants as large as $1.2 million for development of new services and programs. She has served on many boards including the American Heart Association’s Westmoreland Chapter, the Latrobe Area Chamber of Commerce and Adams Memorial Library.

Anupama (Anu) Jain, Ph.D., is the founder of Inclusant and specializes in diversity and inclusion education. Clients include the Greater Pittsburgh Arts Council and the Ring of Hope campaign for domestic violence awareness. Her major scholarly publication is a book about race, immigration, and the American Dream, called “How to Be South Asian in America: Narratives of Ambivalence and Belonging.” Anu’s cross-sector engagements similarly focus on community building, negotiating cultural differences, the relationship between the local and the global, and social justice activism. She has taught English and Women’s Studies at the University of Pittsburgh; previously, she held teaching appointments at Colby College in Maine and Union College in New York.

Diana Nelson Jones, neighborhoods reporter for the Pittsburgh PostGazette is a graduate of the Ohio University School of Journalism. She has worked for the Huntington (WV) HeraldDispatch covering education, veterans affairs and writing features; the Tulsa Tribune writing features, and the Post-Gazette since late 1989. Diana has held the city neighborhoods beat since 2005, and written the Walkabout column, off and on, since 1994.

Rachel Jones is senior editor at Whirl Magazine. A resident of Washington, PA, she graduated from Kent State University in May 2012 with a bachelor’s of science degree in magazine journalism. During the summer before her senior year, Rachel completed an internship at WHIRL Publishing. In October 2012, she started working with the company full-time. As the current senior editor, Rachel writes and edits stories for WHIRL Magazine, Edible Allegheny Magazine, and WHIRL Wedding Guide. Interviewing everyone from baseball stars to brides, She is able to share the wonderful stories of the people of Pittsburgh.

Max King is the President and CEO of The Pittsburgh Foundation. His career has included time as an editor and writer on newspapers and magazines, leadership of two important institutions in the American philanthropic community, and service on numerous civic boards and committees. He served almost eight years as the editor of The Philadelphia Inquirer in the 1990s, nine years as the president of The Heinz Endowments, and six years on the board of the National Council on Foundations, including two years as chair. Max received his Bachelor of Arts degree cum laude from Harvard University in 1967, and attended the Stanford Executive Program at Stanford University’s Graduate School of Business.

Albert Lee, Esq., is a management-oriented employment and labor law attorney, who is also a professional speaker and educator. He is a Shareholder with the Pittsburgh-based law firm of Tucker Arensberg, PC, which has received multiple Best Law Firm Rankings by U.S. News & World Report—Best Lawyers. His clients range from some of the largest international companies and insurers to regional family-owned businesses and are concentrated in the nonprofit, healthcare, manufacturing, service and educational sectors. He received his law degree from the University of Pittsburgh School of Law, where he served in a number of editorial positions on the Journal of Law and Commerce.

Ed Levy is a counselor at SCORE in Canton, Ohio and provides assistance with company formation and start-up issues. He is a certified Public Accountant with a strong legal background with over 40 years’ experience in bookkeeping, accounting, finance, budgeting, planning, cash-flow management, taxation, employee benefit plans and cost accounting. Ed is familiar with a wide variety of construction, manufacturing, service and natural resource industries and has a strong IT background.

Maureen Mahoney Hill, CFRE, is an independent consultant working with nonprofit organizations to build capacity in fundraising, communications and marketing. Started in 2006, her practice specializes in planning and strategy development for major and planned gifts. With more than 20 years of experience in fundraising, Maureen has held development positions with The Children’s Institute, The Pittsburgh Foundation, Penn State and The Women’s Center & Shelter of Greater Pittsburgh. In addition to serving as an instructor for the Bayer Center for Nonprofit Management, Maureen is a frequent presenter for the Foundation Center at the Carnegie Library of Pittsburgh.

Dick Mautz is a SCORE counselor who brings 35 years working in manufacturing, specifically for Timken, a leading global maker of precision bearings and specialty steels. Dick’s responsibilities spanned industrial engineering, manufacturing production management, corporate quality advancement and market segment and plant quality advancement and control. Dick also has developed expertise in organizing and operating a 501(c)3 enterprise and is a co-founder of the annual Canton Carnival of Wheels that was launched in 2008. He earned a B.S. in B.A. degree in Industrial Management from Youngstown State University and is a U.S. Army veteran.
Instructor Bios Continued

Sue McLaughlin has been an ESC volunteer since 1995. Previously, she spent twenty-five years as an attorney at the U.S. Department of Housing and Urban Development, responsible for overseeing the planning, financing and management of FHA-insured hospitals, nursing homes and multi-family housing. As an ESC volunteer, Sue has worked with numerous nonprofit clients on review and revision of bylaws, board development, executive director mentoring, fundraising, and other tasks. She has also been a facilitator for the regional dialogues sponsored by Alan Kukovich, “The Power of 32,” and is an active member of South United Methodist Church in Wilkinsburg.

Cheryl J. Melinchak has over 25 years’ experience in all facets of Human Resources, including labor relations, employee relations, policies and procedures, employment, compensation and benefits. She retired in 2012 as Director of US Benefits for Westinghouse Electric Company, LLC. In addition, she served on the Board of Directors for the Pittsburgh Business Group on Health (PBGH) for 10 years, including serving as Secretary, Vice President and President of the Board of Directors. During tenure as President of the Board, PBGH served as the focal point for employers throughout the Highmark Blue Cross and UPMC dispute.

Bob Moll joined ESC in 2004 after serving as the Manager of IT Security & Policy for PPG Industries for 20 years. He has been a consultant for various organizations for the past 10 years including The Allegheny County Coalition for Recovery, Andrew Carnegie Free Library, Central Northside Neighborhood Council, Focus on Renewal, Peer Support & Advocacy Network, Pittsburgh Cares, POWER, Sewickley Community Center, and the School Performance Network. His expertise is in accounting and finance, information systems, and strategic planning.

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

Dr. Anthony R. Petroy is the Assistant Professor and Department Head of Organizational Leadership for Robert Morris University. He holds a bachelors degree in accounting from The Pennsylvania State University, masters degree in management from Troy State University, and a doctorate degree in management/organizational leadership from the University of Phoenix. Anthony has trademarked a motivational lecture series titled “Inspiration through Knowledge.” Additionally, He has over twenty years of corporate experience in international and globalized markets. He has held senior staff positions of Controller, Chief Financial Officer and Vice President of International Operations and is a United States Air Force veteran.

Thomas J. Ryan is a CPA with a MS in Taxation. He is a partner with Horovitz, Rudoy & Roteman, and is in charge of the nonprofit practice, as well as being certified in Financial Forensics. Tom is a frequent speaker at training events in various parts of the eastern United States. He has presented topics on internal controls, identifying fraud, and accounting and auditing topics for nonprofit organizations. His presentations focus on the practical aspects of applying complex rules to everyday management situations.

Gary J. Stern is president of Portland, Maine-based Stem Consulting International, specializing in governance, strategic planning, and marketing with small and large nonprofits advancing a great diversity of missions. His practice also includes associations, government, and multi-sector collaborations. Gary authored “Marketing Workbooks for Nonprofit Organizations Volume I: Develop the Plan” and “Volume II: Mobilize People for Marketing Success,” both in circulation around the world. He edited the 2nd edition of the Drucker Foundation Strategic Self-Assessment Tool and led the Drucker Foundation International Training Team. No stranger to Pittsburgh, Gary is a popular Bayer Center trainer and recently completed in-depth strategic planning with WQED.

Mike Tarle, Director Massaro Design Build, LLP, has worked in the construction industry since 1989 and joined Massaro in 2004. Mike is a registered architect in PA, Ohio, and WV. His wide range of experience includes architecture, real estate development, project management, business development, and facility management. Mike has a master’s degree from the University of Pittsburgh in business administration and a bachelor of architecture from Kent State. Mike holds a certificate of Mastery in Design/Build, and is a designated Design/Build Professional from The Design/Build Institute of America.

Joe Tavella, Vice President, New Business at Massaro Corporation began his career with Massaro Corporation in 1994 after graduating from the University of Pittsburgh with a civil engineering degree. Over the years, he has acted in a variety of positions such as a laborer, assistant project manager, estimator, senior estimator and director of preconstruction services. Joe possesses both field and office experience enabling him to make the right decisions at the right time. Joe is currently responsible for managing Massaro’s preconstruction/estimating and business development departments.

Frederick W. Thieman is President of the Buhl Foundation, Pittsburgh’s oldest multi-purpose foundation. Prior to his current role, he pursued a 30-year legal career that included both private practice and serving from 1993-97 as United States Attorney for the Western District of Pennsylvania. Fred has served on numerous nonprofit and foundation boards including the Heinz Endowments and the Buhl Foundation, and is the recipient of numerous civic leadership awards from organizations such as the University of Pittsburgh, the Urban League and the Mentoring Partnership of Southwestern Pennsylvania. He is a magna cum laude graduate of the University of Pittsburgh School of Law.

Alice Warfield was most recently a Group Leader at PNC Bank, overseeing the region’s call centers, specializing in providing excellent customer care. She provided training, development and coaching of employees and supervisors. She serves as a Women’s Leadership Council Member at the United Way of Allegheny County, and served on the PNC Call Center Diversity Council and on the Board of Directors for the Career Connections Charter High School. She joined ESC in 2012, and has worked in training and development for nonprofit supervisors and leaders.
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QUESTIONS? Please contact the Bayer Center at 412-397-6000 or bcnm@rmu.edu.

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The registration deadline for all classes is one week before the course begins (or the first session of a series). Register early – space is limited. You may register for any of the courses online at rmu.edu/bcnmregistration or by mailing the form on page 25 with payment in full by check or credit card. Need additional registration forms? Visit BCNM-RMU.org for a general registration form.

SCHOLARSHIPS
Scholarships of up to 50 percent of program costs are available to a limited number of participants. For more information or to access the scholarship application, visit the education section of our website at BCNM-RMU.org or call 412-397-6000.

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

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