

2013 NONPROFIT SUMMIT



FROM IDEAS TO ACTION

MAY 23, 2013 • 7:00AM - 2:00PM
Wyndham Grand Pittsburgh • 600 Commonwealth Place



Greater Pittsburgh
Nonprofit Partnership



THE FORBES FUNDS

Hosted by The Greater Pittsburgh Nonprofit Partnership (GPNP) in association with The Forbes Funds



They are young and old. Friends and neighbors. People with great talent and vision. Dedicated to making communities strong. Workplaces vibrant. Eliminating barriers and coming together. At Highmark, we salute all those who help make our communities, our region and our world a better place to live, work and raise a family.



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SYLVIA HILL FIELDS
Executive Director
Eden Hall Foundation



BRIAN SCHREIBER
President and CEO
Jewish Community Center

Welcome

The **Greater Pittsburgh 2013 Nonprofit Summit: From Ideas to Action** welcomes more than 800 professionals and volunteers today, a true reflection of the sector's strength. Western Pennsylvania's nonprofit sector is a significant force in our region as both an economic generator and a source of community wellbeing. Our nonprofits give citizens a greater voice while ensuring a vibrant community. From Ideas to Action provides an unparalleled educational and networking opportunity that addresses issues faced by nonprofits of all sizes and concentrations. We hope you will find it to be an effective way to hear the latest practices and have dialogue about how to implement them.

Hosted by the Greater Pittsburgh Nonprofit Partnership and The Forbes Funds please enjoy this event and see it as an opportunity designed to network and strengthen economic and community organizations, health and human service agencies, and arts and environmental organizations in Western Pennsylvania.

On behalf of our board and committee, we also extend a very warm welcome to our keynote speaker, Jeanne Bell, MNA, CEO of CompassPoint Nonprofit Services who will deliver the keynote address today, as well as our many other out of town speakers. We look forward to hearing from Jeanne and our other distinguished speakers today. Thank you all for sharing your wisdom with our community.

Enjoy the day!

The Frieda Shapira Medal for Exemplary Leadership



John Lovelace
UPMC

The Forbes Funds presents The 8th Frieda Shapira Medal to John Lovelace in recognition of his exceptional leadership accomplishments that advanced the nonprofit field; and commitment to service beyond one's own organization.

John Lovelace has been President of UPMC for You since 2007. In this role, he provides leadership, direction and administration for the services provided by UPMC for You, a provider-owned, federally tax-exempt, nonprofit managed care organization, which has its headquarters in Pittsburgh. UPMC for You offers coverage to eligible Medical Assistance and Medicare Advantage Special Needs recipients in 40 Pennsylvania counties through its contracts with the Pennsylvania Department of Public Welfare as well as coverage options for Medicare beneficiaries who are also enrolled in the Pennsylvania Medical Assistance program.

UPMC for You is ranked as one of the nation's top-10 Medicaid programs for customer service and effectiveness of care by the National Committee for Quality Assurance (NCQA) and is consistently ranked as the No. 1 Medicaid program in Pennsylvania. In terms of consumer satisfaction, UPMC for You ranks in the top-5 nationally.

Since 1996, Mr. Lovelace has also served as the Chief Program Officer for Community Care Behavioral Health, which is also part of the UPMC Insurance Services Division. Community Care is a provider-owned, federally tax-exempt, nonprofit behavioral health managed care organization headquartered in Pittsburgh that manages behavioral health benefits for members throughout Pennsylvania whose health insurance is sponsored through Medicaid and UPMC Health Plan's Medicare and commercial plans. Community Care manages behavioral health services for approximately one million enrollees. Community Care received full accreditation from the NCQA, and scored 100% in its accreditation review.

The Frieda Shapira Medal

In 2003, The Forbes Funds inaugurated the Frieda Shapira Medal for Exemplary Leadership, honoring Frieda Shapira as a lifetime community reformer. As a social worker for the Children's Service Bureau, Frieda taught neglected and dependent children, and as a trustee she served numerous organizations, including The Pittsburgh Foundation, The United Way of Allegheny County, The United Jewish Federation of Greater Pittsburgh and The Forbes Funds.

The medal is awarded bi-annually to an individual who:

- has demonstrated leadership across lines of race, class, and religion,
- views the people he/she serves as consumers and equal stakeholders
- possesses a deep sense of compassion, backed with the knowledge, work ethic, and determination to effect change,
- is a coalition builder,
- is an effective leader who encourages and inspires others,
- and betters the community through social justice work.

The Frieda Shapira Medal for Exemplary Leadership is presented in cooperation with the Jewish Healthcare Foundation and includes a \$5,000 cash prize.

Alfred W. Wishart, Jr. Award Finalists for Excellence in Nonprofit Management



Jewish Family & Children's Service of Pittsburgh

Jewish Family & Children's Service of Pittsburgh (JF&CS) is an independent 501(c)(3) organization whose mission is to improve the quality of life of families and individuals of all ages throughout the Greater Pittsburgh area by providing psychological, employment and social services. Services are provided and referrals are made without regard to race, color, religion, ancestry, national origin, place of birth, sex, sexual orientation, familial status, age, handicap or disability.

For more than 75 years, JF&CS has remained vital and relevant by continuously adapting our programs and services to meet the changing needs of our dynamic population. JF&CS is a known leader in providing innovative and effective social service solutions that help thousands of people every year cope with lifecycle transitions and crises.

Community Human Services Corporation

Community Human Services Corporation seeks to enhance people's lives and strengthen communities by providing opportunities to develop individual potential and by delivering comprehensive services that maximize the health and well-being of those it serves in South Oakland and the greater Pittsburgh area. The agency believes healthy communities are comprised of individuals who have their basic needs met, the opportunity to develop meaningful relationships and grow their unique skills and abilities. At CHS, each program focuses on this core belief and facilitates each participant's journey toward their personal, social and communal wellness.

Familylinks

For more than 50 years, Familylinks has been helping children, individuals and families learn, grow, heal and cope so that they can become strong, for life. Life's challenges can be complex, overwhelming and affect everyone in the household. That is why we offer a full range of compassionate, non-judgmental, specialized programs and services to help.

From the Lesbian, Gay, Bisexual, Transgender or Questioning (LGBTQ) adolescent struggling to be accepted, to the elementary school student who desperately needs an alternative environment to learn, to the family struggling with addiction and conflict, to the older adult trying to maintain independence, we understand what you are facing. Our caring intake professionals can link you to the Familylinks program(s) that can help.

The Wishart Award

The Alfred W. Wishart, Jr. Award honors local nonprofit human service or community development organizations that have demonstrated a sustained commitment to excellence in management and governance.

The award is presented bi-annually to an organization that has consistently demonstrated:

- leadership among the staff and board of directors,
- the use of information and objective analysis in planning and programming,
- a commitment to excellence in human resource management,
- a continuous improvement of service delivery processes,
- measurement and monitoring of outcomes,
- a commitment to consumer satisfaction,
- openness to collaborative efforts with other organizations, and
- accountability to the public trust.

Each Wishart Award winning organization is publicly honored for its achievements and receives a \$10,000 cash grant to be used for management support purposes. Award runners-up each receive \$5,000.



MASTER OF CEREMONIES:

Michael Bartley

WQED TV

EMMY Award winning managing editor and host, Michael Bartley has been covering issue-oriented, in-depth stories at WQED Pittsburgh for 13 years. In the fall of 2012, Bartley launched a new Charlie Rose-style program called Conversation@WQED. Michael's one-on-one guests have included Chip Ganassi, Sy Holzer, Charlie Batch, Jackie Evancho and more.

Pittsburgh area community leaders and WQED viewers have praised Michael's sensitivity and precision fact-finding while Michael presents challenging and probing issues. Steelers chairman Ambassador Dan Rooney has called Michael "a true asset to the region."

Bartley has won 12 regional EMMY awards for numerous stories during his tenure at WQED. He has also been honored by the Associated Press, The Society of Professional Journalists, United Press International, and The Radio and Television News Directors Association, among others. Mr. Bartley was also named the 1997 Marquette University Communications Alumnus of the Year.

He is a graduate of Pittsburgh Central Catholic High School and Marquette University. In 2012, he was named a Central Catholic High School Distinguished Alumnus. Michael serves on numerous civic and nonprofit boards, including Gateway Rehabilitation Center, St. Vincent College of Fine Arts, The Art Rooney Awards Dinner, The Delta Foundation, The Marquette University Center for Government on Capitol Hill, St. Rosalia Pastoral Council, and more.

A resident of Pittsburgh's Greenfield neighborhood, Michael takes great pride in telling people he still lives in the very house he grew up in.



KEYNOTE SPEAKER:

Jeanne Bell, MNA

CEO, CompassPoint
Nonprofit Services



Jeanne Bell, MNA is the CEO of CompassPoint Nonprofit Services—one of the country's leading providers of leadership and organizational development services to nonprofit organizations. She is the co-author of *Nonprofit Sustainability: Making Strategic Decisions for Financial Viability* (Jossey-Bass) and *Financial Leadership for Nonprofit Executives: Guiding Your Organization to Long Term Success* (Turner). In addition to frequent speaking and consulting on nonprofit strategy and finance, Jeanne has conducted a series of research projects on nonprofit executive leadership, including *Daring to Lead 2011: A National Study of Nonprofit Executive Leadership* and *Securing the Safety Net: A Profile of Community Clinic and Health Center Leadership in California*. Jeanne currently serves on several boards, including the Alliance for Nonprofit Management, The Nonprofit Quarterly, and Intersection for the Arts.

CompassPoint is a national, nonprofit leadership and organizational development practice based in Oakland, CA. Our mission is to intensify the impact of fellow nonprofit leaders, organizations, and networks as we achieve social equity together.

**KEYNOTE ADDRESS — Sustainability: Aligning Your Board and Staff
Around a Viable Business Model**

In so many fields, leaders are experiencing shifts in funding or in expectations around program design and impact. These forces require us to candidly assess our program and fundraising activities and to make bold decisions in service of what our communities and causes most need from our organizations. To lead that assessment and change process—and to keep both the board and staff aligned and hopeful about the organization's future—is among the hardest aspects of nonprofit leadership. Drawing on her own experience as CompassPoint's CEO and her extensive strategy work with nonprofit clients, Jeanne will suggest a framework for senior staff, executives, and board members to achieve clarity on their organization's optimal business model and to work together to ensure its sustainability.

2013 Nonprofit Summit Planning Committee Co-chairs

Sylvia Hill Fields

Executive Director, Eden Hall Foundation

Sylvia Hill Fields has served as manager and later executive director of the Eden Hall Foundation since May 1996. Mrs. Fields is responsible for the allocation of over \$9 million annually. She is the first and only African American woman to direct a major private foundation in the Pittsburgh region.

A veteran grantmaker and administrator, she manages the legal and financial business of the foundation. Mrs. Fields began her grantmaking career at the Duquesne Light Company, where she also managed the Employee Involvement Committee, United Way Annual Campaign and the company school partnership program. While at Duquesne Light, Mrs. Fields is best known for having established a Pittsburgh Chapter of the American Association of Blacks in Energy.

Active in various professional organizations, Mrs. Fields is a member of the Council on Foundations and serves as a director of The Carnegie Museums of Pittsburgh, the Pittsburgh Cultural Trust, the World Affairs Council of Pittsburgh, The Ellis School, the Jewish Women's Foundation and Magee-Womens Research Institute & Foundation.

Brian Schreiber

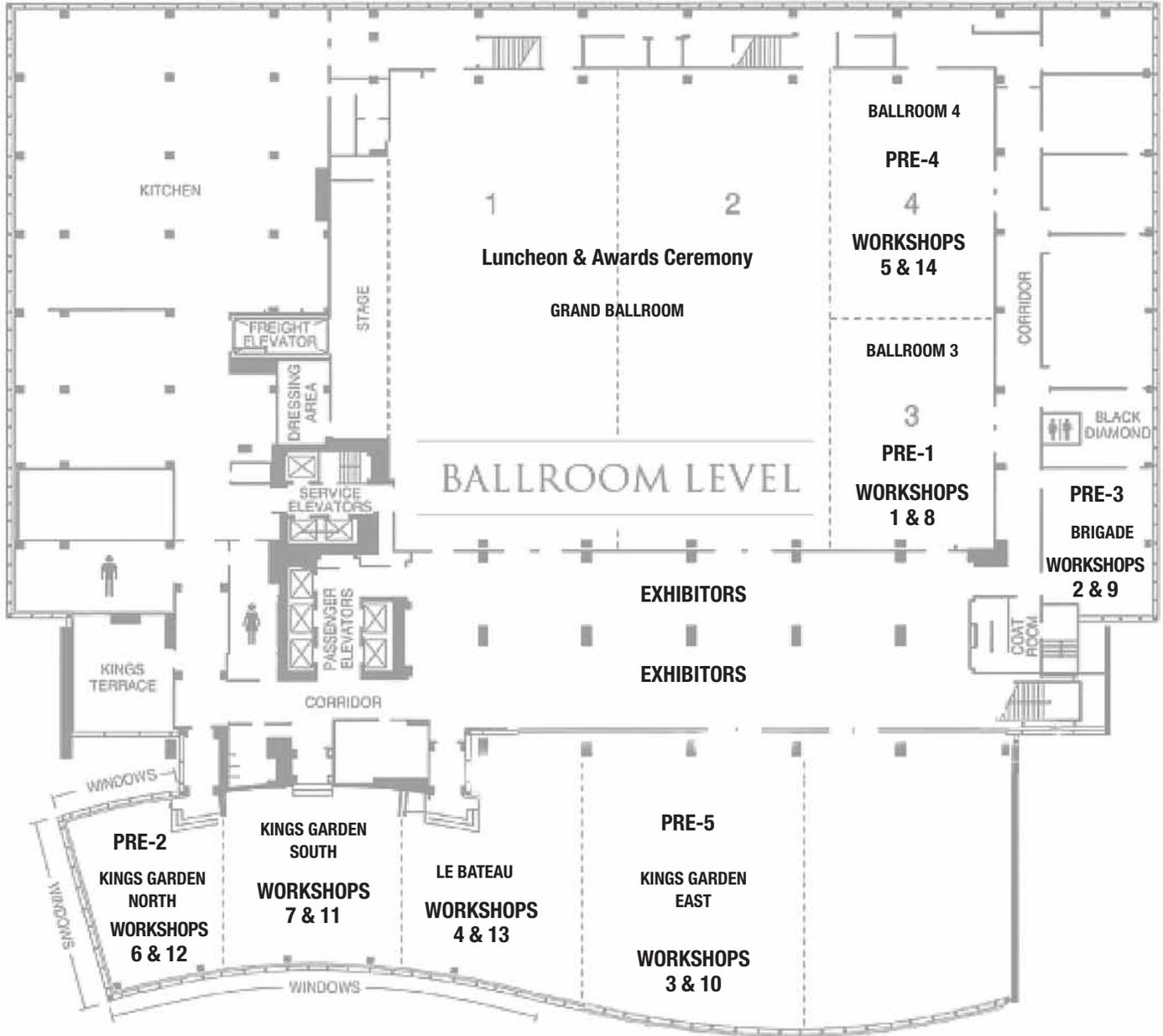
President and CEO, Jewish Community Center

Brian Schreiber joined the Jewish Community Center (JCC) of Greater Pittsburgh in 1999 as President & CEO. Schreiber directs this multi-faceted community agency with an \$19 million annual budget and membership base of 17,000 individuals specializing in the following areas of human service: early childhood, youth, older adults, health and wellness, camping, special needs, and cultural arts.

He currently serves as Chair of the Greater Pittsburgh Nonprofit Partnership, a coalition of 300 organizations formed to give the sector a unified voice through advocacy and capacity building. He also sits as a board member of Allegheny Health Choices, Inc., AllFacilities Energy Corp., LCC and is a past member of the Forum of United Way Agencies and its Neighborhood Impact Council. Earlier volunteer experiences include service as a Big Brother in Baltimore, and as a suicide/crisis intervention specialist for Contact Pittsburgh.

2013 Nonprofit Summit Planning Committee

Kenya Boswell	Karris Jackson	John Sawyer
Diana Bucco	Wayne Jones	Mike Schiller
Kristen Burns	Jesse McLean	Amy Snider
Dave Coplan	Mildred Morrison	Steve Sokol
Bethany Davidson	Stefani Pashman	Jordana Stephens
Colleen Fedor	Karen Rath	Barbara Taylor
Lauri Fink	Sam Reiman	Bobbi Watt Geer
Don Goughler	Kim Ravenda	
Amy Hart	Deb Ries	



Continue the Summit conversation on Twitter! #NPSSummit@GPNPpgh

CONFERENCE SCHEDULE:

7:00 – 8:00 AM REGISTRATION

7:30 – 8:30 AM PRE-CONFERENCE WORKSHOPS

ROOM:

- PRE-1. The Affordable Care Act, Preparing for 2014 BALLROOM THREE
- PRE-2. Gifts That Give Back – Developing a Planned Giving Program..... KINGS GARDEN NORTH
- PRE-3. Workforce Abuse Prevention, Policies and Procedures BRIGADE
- PRE-4. How Nonprofits Can Advocate for Their Cause BALLROOM FOUR
- PRE-5. Engaging Corporate Volunteers in High-Impact Service..... KINGS GARDEN EAST

8:30 – 8:45 AM Opportunity to visit exhibitors

8:45 – 9:45 AM Welcome + Keynote / Welcome from Summit Co-Chairs..... GRAND BALLROOM

9:45 – 10:00 AM Opportunity to visit exhibitors

10:00 – 11:15 AM WORKSHOP SESSION ONE

ROOM:

- 1. A Briefing From Foundation Leaders BALLROOM THREE
- 2. The Development Dilemma BRIGADE
- 3. Disruptive Forces at Play...Redefine Your Organization & Create Opportunity..... KINGS GARDEN EAST
- 4. Lessons Learned...Stories from First Time EDs LE BATEAU
- 5. Capturing the Value: Making the Link from What You Do to What You Achieve BALLROOM FOUR
- 6. Using Technology to Innovate Nonprofit Service Delivery KINGS GARDEN NORTH
- 7. The Science & Art of Asking and Giving KINGS GARDEN SOUTH

11:15 – 11:30 AM Opportunity to visit exhibitors

11:30 AM – 12:45 PM WORKSHOP SESSION TWO

ROOM:

- 8. A Briefing From Foundation Leaders BALLROOM THREE
- 9. The Development Dilemma BRIGADE
- 10. Disruptive Forces at Play...Redefine Your Organization & Create Opportunity KINGS GARDEN EAST
- 11. Stop the Madness: Managing Change through Scenario Planning..... KINGS GARDEN SOUTH
- 12. Employees Unleashed: Creating an Organizational Culture of Innovation KINGS GARDEN NORTH
- 13. Strategic Financial Management LE BATEAU
- 14. Game Changing Community Strategies BALLROOM FOUR

12:45 – 1:00 PM Opportunity to visit exhibitors

1:00 – 2:00 PM Luncheon and Awards Ceremony..... GRAND BALLROOM

Pre-Conference Programs: 7:30 – 8:30 am

1. The Affordable Care Act, Preparing for 2014

Since 2010 employers large and small have been impacted by the Affordable Care Act. As we approach the year 2014 even more changes are in store. Huntington will offer insight into the next phase of this historic legislation, particularly as it may impact nonprofit organizations.

Specifics topics will include:

- How to calculate the number of Full Time Equivalents to determine if you are a “large employer”
- Understanding the need to offer affordable coverage in order to avoid the penalties that can be imposed on a large employer
- Determining if your premium contribution results in affordable coverage for your employees
- Discussing the role of Insurance Exchanges
- Reviewing the implications of the Individual Mandate

2. Gifts That Give Back – Developing a Planned Giving Program

In today’s world, as funding in the not-for-profit sector evolves, it is more important than ever for organizations to consider their support structure and diversify funding streams. It might be the right time to develop and launch a planned giving program to add to the mix. We will explore the basic structures of a planned giving program and consider.... is this the right time and is the Board “on board”? This discussion will include topics such as:

- What are the types of Planned Gifts?
- How to get your Board “on board”?
- How to develop a planned giving policy and committee?
- What are some important accounting considerations?

3. Workforce Abuse Prevention, Policies and Procedures

The program will feature discussion and guidance on the Abuse & Molestation security programs in place for Non-Profit organizations pre-hire, during initial training and on-going training. What to look for in an employee and policies/procedures to help maintain the organizations high-level of standards regarding this subject.

BALLROOM THREE

PRESENTERS:

Kurt M. Ulrich, Vice President, Senior Sales Executive, Huntington Bank

Jacqueline Garry Lampert, Founder, Lake Street Strategies, LLC; Consultant to UPMC Health Plan



KINGS GARDEN NORTH

PRESENTERS:

Kimberly P. Griffith, CPA, Alpern Rosenthal

Deanna M. Conte, CPA, Alpern Rosenthal

Frederick H. Leasure, CFRE, Alpern Rosenthal



BRIGADE

PRESENTER:

Heather Barron-Bowlin, Assistant Vice President of Marketing for Philadelphia Insurance Companies



4. How Nonprofits Can Advocate for Their Cause

The Campaign for What Works is a civic effort that supports publicly funded, human and social service programs that work for consumers, providers, and taxpayers. We will discuss the methods we have used to successfully impact public policy, and share examples of how you or your organization can make an impact too.

5. Engaging Corporate Volunteers in High-Impact Service

Highmark engages hundreds of employees annually in volunteer service throughout the region. In partnership with Pittsburgh Cares, Highmark has developed a highly successful, high-impact employee volunteer program. Learn a few tricks of the trade when it comes to recruiting, retaining, and engaging corporate volunteers in service to your organization. We will discuss best practices of planning corporate volunteer planning and share how you too can more fully engage corporate volunteers at your organization.

BALLROOM FOUR

PRESENTERS:

John Denny, President, Denny Civic Solutions,
Chief Strategist, Campaign for What Works

John Rhoades, Public Policy Initiatives
Coordinator, United Way of Allegheny County



KINGS GARDEN EAST

PRESENTERS:

Alex Matthews, Community Affairs Specialist,
Highmark

Amanda Trocki, Director of Corporate
Programs, Pittsburgh Cares



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Workshop Sessions ONE: 10:00 – 11:15 am

1. A Briefing From Foundation Leaders

Although most foundations are required to distribute 5 percent of their investment assets annually for charitable purposes, philanthropy is about choices. How will the rapidly changing region and world impact the choices foundations make? How will priorities shift to meet new demands and trends? What will be the expectations of grantees?

2. The Development Dilemma

A new national study of over 2,700 executive directors and development directors, reveals that too many nonprofit organizations are stuck in a vicious cycle that threatens their ability to raise the resources they need to succeed. With high levels of turnover and lengthy vacancies in development director positions; lack of basic fundraising systems and inadequate attention to fund development, nonprofits often face a development dilemma. Join us for a discussion of the newly released study UnderDeveloped and learn of implications and the actions that nonprofit leaders, funders, and capacity builders can take to develop the conditions needed for organizations to break this cycle.

3. Disruptive Forces at Play that Will Redefine Your Organization & Create Opportunity

Head spinning from information overload? Do you feel like you are in a bunker fighting to stay alive? If you are ready to explore the future and the opportunities it may bring, this session is designed to provoke your thinking. It will not leave you with an answer but rather a set of better filters to sort out the noise around you and better drive decision-making and strategy. Join Polina Makievsky from The Alliance for Children and Families as she discusses the Alliance's report on Disruptive Forces that helps organizations plan for successful futures by illuminating complexity, inspiring tough conversations, and pushing them to think outside of their comfort zone.

4. Lessons Learned...Stories from First Time EDs

Thinking about becoming a first time Executive Director? This session highlights the results of the recently completed national research on first-time executive directors by Vantagen. It will:

- expose challenges facing first time ED's
- engage in dialogue around learning curve issues, and how they can ultimately impact organizations
- provide data and direct experiences to help deal with these issues and defy the impact.

BALLROOM THREE

FACILITATOR:

Brian Schreiber, President & CEO, The Jewish Community Center of Greater Pittsburgh

SPEAKERS:

Sylvia Hill Fields, Executive Director, Eden Hall Foundation

David K. Roger, President, Hillman Family Foundation

Gregg Behr, Executive Director, The Grable Foundation

BRIGADE

FACILITATOR:

Diana A. Bucco, Vice President, The Buhl Foundation

SPEAKER:

Marla Cornelius, Senior Project Director, CompassPoint Nonprofit Services

KINGS GARDEN EAST

FACILITATOR:

Donald H. Goughler, President and CEO, Family Services of Western Pennsylvania

SPEAKER:

Polina Makievsky, Senior VP for Leadership, Knowledge and Innovation, Alliance for Children and Families

LE BATEAU

FACILITATOR:

Frederick W. Thieman, Esq., President, The Buhl Foundation

SPEAKERS:

Todd Owens, Partner, Vantagen

Lisa A. Scales, Executive Director, Greater Pittsburgh Community Food Bank

Steve Sokol, President and CEO, World Affairs Council of Pittsburgh

Michelle McMurray, President and CEO, Mental Health America

5. Capturing the Value: Making the Link from What You Do to What You Achieve

You do good work, but how might you quantify the results of your efforts in ways that transcend the anecdotal success story? With lasting community impact as our goal, we need to clearly define, track and roll-up results from our efforts and dollars. This talk simplifies the often complex notion of Outcome Management and uses relevant examples and interactive dialogue with participants to help you make the 'link' from what you do to what you achieve for your clients.

6. Using Technology to Innovate Nonprofit Service Delivery

Nonprofits are under unprecedented pressure to produce more results, with more clients, for less money. To shed light on how organizations are meeting this challenge, MAP for Nonprofits commissioned a study by Idealware to investigate how Minnesota service providers are innovating their service delivery, with an eye to factors that foster innovation. During this session, we will highlight key findings and best practices, along with real-world examples. How will these stories inspire your organization?

7. The Science & Art of Asking and Giving

Compassion and reason sometimes make odd bedfellows. People give more to a person with a name and face, but less to a large group suffering from similar conditions. They give more to a sudden crisis, but less to chronic ills. A personal and emotional story evokes compassion or blame for the person, but not always for the underlying systemic causes. A shocking statistic may garner short-term media attention, yet still fail to promote lasting public engagement with a social issue.

Research findings like these challenge the conventional wisdom of non-profit communication. Using examples from issues affecting children, youth, and families, we analyze existing practices and introduce alternative approaches to engaging our audience in caring and giving. Participants will understand how to apply current research findings to everyday social communication practices and how to use practical, evidence-based approaches to develop messages that promote a lasting connection with the audience.

BALLROOM FOUR

FACILITATOR:

Kristen Ace Burns, Associate Director, Grable Foundation

SPEAKER:

Debra B. Natenshon, CEO, The Center for What Works at The Rensselaerville Institute

KINGS GARDEN NORTH

FACILITATOR:

Wayne Jones, Senior Program Officer, The Heinz Endowments

SPEAKER:

Laura Quinn, Founder and Executive Director, Idealware

KINGS GARDEN SOUTH

FACILITATOR:

Jordana Stephens, Program Officer, Eden Hall Foundation

SPEAKERS:

JunLei Li, Principal Research Scientist, The Fred Rogers Company & University of Pittsburgh Office of Child Development

Colleen O. Fedor, Executive Director, Mentoring Partnership of Southwestern PA

Suguru Ishizaki, Associate Professor of English, Carnegie Mellon University Department of English

8. A Briefing From Foundation Leaders

Although most foundations are required to distribute 5 percent of their investment assets annually for charitable purposes, philanthropy is about choices. How will the rapidly changing region and world impact the choices foundations make? How will priorities shift to meet new demands and trends? What will be the expectations of grantees?

9. The Development Dilemma

A new national study of over 2,700 executive directors and development directors, reveals that too many nonprofit organizations are stuck in a vicious cycle that threatens their ability to raise the resources they need to succeed. With high levels of turnover and lengthy vacancies in development director positions; lack of basic fundraising systems and inadequate attention to fund development, nonprofits often face a development dilemma. Join us for a discussion of the newly released study *UnderDeveloped* and learn of implications and the actions that nonprofit leaders, funders, and capacity builders can take to develop the conditions needed for organizations to break this cycle.

10. Disruptive Forces at Play that Will Redefine Your Organization & Create Opportunity

The Alliance for Children and Families released a report that asserts that the future landscape of the sector will require successful organizations to have a well-honed radar for adaptation. Join Polina Makievsky from The Alliance for Children and Families and a panel of local nonprofit executives to discuss the six disruptive forces that will fundamentally change and transform the nonprofit sector.

BALLROOM THREE

FACILITATOR:

Brian Schreiber, President & CEO, The Jewish Community Center of Greater Pittsburgh

SPEAKERS:

Henry S. Beukema, Executive Director, McCune Foundation and Pitcairn Crabbe

Grant Oliphant, President & CEO, The Pittsburgh Foundation

Joni Siff Schwager, Executive Director at Staunton Farm Foundation

BRIGADE

FACILITATOR:

Diana A. Bucco, Vice President, The Buhl Foundation

SPEAKER:

Marla Cornelius, Senior Project Director, CompassPoint Nonprofit Services

KINGS GARDEN EAST

FACILITATOR:

Donald H. Goughler, President and CEO, Family Services of Western Pennsylvania

SPEAKERS:

Polina Makievsky, Senior VP for Leadership, Knowledge and Innovation, Alliance for Children and Families

Janera Solomon, Executive Director, Kelly Strayhorn Theater

Tony Macklin, Executive Director, Roy A. Hunt Foundation

Al Condeluci, CEO, UCP/Class

11. Stop the Madness: Managing Change through Scenario Planning

In this uncertain time, it seems like the only constant is change. One solution to managing change is developing a scenario plan. Scenario planning is a powerful process in which nonprofit managers invent and then analyze several scenarios of plausible futures, then filter strategic decisions through these scenarios to ensure the strategies will survive any of the plausible futures, making amendments to strategies as part of the process. In attending this session and learning about the art of scenario planning, your organization will be more prepared for whatever comes next.

12. Employees Unleashed: Creating an Organizational Culture of Innovation

The last half of this decade will be about redefining the sector in every dimension. Not wanting to be left behind, how do you create a culture inside your organization that unleashes entrepreneurial thinking? And what are ways that you can put technology, innovation and future trends to work to reach your mission and grow revenue? This is a dynamic and interactive workshop lead by David J. Neff, Teacher, Speaker, Consultant and author of *The Future of Nonprofits: Thrive and Innovate in the Digital Age*.

13. Strategic Financial Management

There is nothing like a recession to serve as a wake-up call for everyone. Nonprofits can no longer deny the critical importance of finance and the need for an overall financial strategy for their organization. During prosperous times it is a bit easier to refrain from regularly analyzing the financial statements, predicting cash flow, making hard decisions about whether to end financially draining programs, creating bold (and potentially risky) revenue streams, and so on. Moreover, the financial strategy of a nonprofit organization often takes a back seat to program policy. This panel of seasoned veterans share lessons learned and practical advice about how to improve the financial management of your organization, regardless of size.

14. Game Changing Community Strategies

Imagine a just and equitable society for all, where all children are nurtured to become compassionate, responsible and self-reliant adults; where families are engaged in the life of their communities, the nation, and the world; and where people take responsibility for meeting today's needs as well as those of future generations. Come learn about how Purpose Built Communities is rebuilding communities across the country and hear local experts share their thoughts on using these strategies in the Pittsburgh region.

KINGS GARDEN SOUTH

FACILITATOR:

Dave Coplan, Executive Director, The Human Services Center Corporation

SPEAKER:

John E. Brothers, Principal and Founder, Quidoo Consulting

KINGS GARDEN NORTH

FACILITATOR:

Kenya T. Boswell, Vice President, Corporate Affairs, BNY Mellon

SPEAKER:

David Neff, Cofounder, Lights. Camera. Help.; Senior Associate, Pricewaterhouse

LE BATEAU

FACILITATOR:

Molly Beerman, Chief Financial Officer, The Pittsburgh Foundation

SPEAKERS:

Linda M. Thier, Consultant

Kevin Gieder, Chief Financial Officer, Environmental Collaborative

Jesse James McLean, CEO, Every Child, Inc

BALLROOM FOUR

FACILITATOR:

Karris Jackson, Vice President of Programs, POISE Foundation

SPEAKERS:

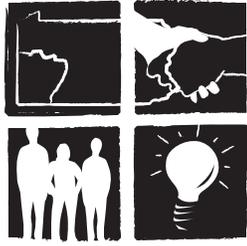
Michele Rone Cooper, Executive Director, McAuley Ministries

Christina Perry, Community Development Advisor, Purpose Built Communities

Evan Smith, Community Development Advisor, Purpose Built Communities

Eric Stoller, Program Officer, Civic Design and Community Revitalization, The Heinz Endowments

GREATER PITTSBURGH NONPROFIT PARTNERSHIP



Greater Pittsburgh
Nonprofit Partnership

THE GREATER PITTSBURGH NONPROFIT PARTNERSHIP (GPNP) is dedicated to providing a united voice for the nonprofit sector in the Southwestern Pennsylvania ten-county region. While local nonprofit organizations have always been a ready resource for policy makers and elected officials to explore issues impacting the community – the GPNP works to harmonize these voices into a collective message. Founded in 2005, the GPNP has a membership of 300 organizations and is one of the largest regional nonprofit associations in the United States. It strives to inspire public participation in shaping the future of the region.

For those who are not members of the GPNP, you should consider joining this well known and well respected organization. Top Ten reasons to belong to the GPNP:

Network with other Members	Professional Development
Credibility in the community	Business Referral Services
Visibility	Resource Center
Publicity & Exposure	Effective Advocacy
Sponsor Signature Events	Connect with Legislators

The Greater Pittsburgh Nonprofit Partnership is led by a 15 member Advisory Team:

Brian Schreiber, (chair) Jewish Community Center of Pittsburgh
Amy Hart, Center for Hearing and Deaf Services
Bernadette Turner, Addison Behavioral Care
Bobbi Watt Geer, United Way of Westmoreland County
Colleen Fedor, Mentoring Partnership of Southwestern PA
Dave Coplan, Human Services Center Corporation
Deb Acklin, WQED
Everett McElveen, Life's Work
Gregg Behr, Grable Foundation
janera solomon, Kelly Strayhorn Theater
Jesse McLean, Every Child, Inc.
John Lydon, Auberle
Ken Service, Pittsburgh Council on Higher Education
Michael Smith, Goodwill of Southwestern PA
Susan Rauscher, Catholic Charities

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Margaret M. Petruska
Walter Smith
Jane Werner

THE MISSION OF THE FORBES FUNDS, as a supporting organization of The Pittsburgh Foundation, is to strengthen the management and policy-making capacity of the nonprofit sector by providing the support, resources and knowledge needed for high-performing nonprofits.

The Forbes Funds was established in 1982 to provide emergency financial assistance to nonprofit organizations that were experiencing funding interruptions or short-term cash flow problems. Under the leadership of our founding director, Elmer J. Tropman, The Forbes Funds provided management consultation and advice to small nonprofit organizations and conducted regional scans to identify unmet needs in the human services sector. We provided an important service during a particularly turbulent time when many nonprofit organizations were struggling to adjust to a new domestic policy agenda, as well as to significant changes in federal and state funding priorities and procedures.

By the late 1980s, while continuing to provide loan guarantees, the emphasis of our work shifted to long-term capacity building in the nonprofit sector. During this time, The Forbes Funds focused on helping nonprofits improve administrative skills and infrastructure with special emphasis on long-range planning and strategic management. Through our grantmaking, The Forbes Funds helped nonprofit organizations secure technical assistance to address critical matters such as strategic planning, financial management, and board governance.

Beginning in 1996, The Forbes Funds advanced efforts to support management capacity building and strategic planning, while also addressing such sector-wide issues as inter-agency partnerships and mergers. Building upon our successful capacity building strategy, in 2013 we have redefined our focus to concentrate on three complementary activities which now comprise the core of our work – Management Assistance, Scalable Solutions, and Innovation – through which The Forbes Funds has elevated its role and its profile as we respond to the critical needs of the nonprofit sector. Given the rapid changes in the nonprofit sector and the tumultuous economic environment in which each nonprofit organization must advance their mission, the work of The Forbes Funds is more relevant than ever. As we pursue our mission, we envision and support a nonprofit sector that is innovative, informed, and engaged, resulting in providers who better serve the needs of their communities, and funders who are confident in the value and impact of their investments.

SPEAKER BIOGRAPHIES

Heather Barron-Bowlin **Philadelphia Insurance Companies**

Heather Barron-Bowlin is Assistant Vice President of Marketing for Philadelphia Insurance Companies. She has been with the company for 16 years and has worked with all facets of Non-profit Insurance in the Commercial Property and Casualty segment. Heather holds her Certified Insurance Counselors designation as well as her Certified Risk Managers and Registered Professional Liability Underwriter designations. She is a native of Western PA growing up in Somerset, PA and a graduate of Millersville University. She currently resides in Lebanon, PA with her husband Heath Bowlin.

Molly Beerman **The Pittsburgh Foundation**

Molly joined The Pittsburgh Foundation as VP Finance and Administration in November 2012 from Alcoa, where she spent 11 years in finance, shared services, procurement, and information systems leadership roles.

Prior to Alcoa, Molly worked for Carnegie Mellon University as Associate Controller and PNC Bank as Finance Functional Manager. Though her industry experiences are varied, she has always been drawn to roles that combine process and system improvement with technical accounting requirements. She has led major systems implementations using Oracle, Hyperion, Ariba, and other business applications.

Molly started her career with Deloitte & Touch and is a Certified Public Accountant.

Gregg Behr **The Grable Foundation**

Since late 2006, Gregg Behr has served as Executive Director of The Grable Foundation, a Pittsburgh-based foundation dedicated to improving the lives of children. From 2002-2006, Mr. Behr was President of The Forbes Funds, a foundation intermediary that supports nonprofit capacity building, community research, and leadership development. Prior to assuming his position at The Forbes Funds, Mr. Behr practiced as a litigator with Buchanan Ingersoll & Rooney, during which time he received the Outstanding Young Lawyer Award presented by the Allegheny County Bar Association.

Mr. Behr serves on the honor board for the Mentoring Partnership and as a trustee for A+ Schools, the Women & Girls Foundation, and Grantmakers of Western Pennsylvania. Additionally, he sits on advisory councils for the United Way of Allegheny County, as well as the Institute of Politics and the Johnson Institute for Responsible Leadership, both at the University of Pittsburgh.

Henry S. Beukema **McCune Foundation, Pitcairn-Crabbe Foundation**

In January 2012, Henry Beukema passed his thirty-second anniversary as a western Pennsylvania grantmaker, having spent 12+ years with the Heinz Endowments and Pittsburgh Foundation as a Program Officer, and 20 years at McCune Foundation as Executive Director. Since January 2000 he has also been Executive Director of the Pitcairn-Crabbe Foundation.

His current responsibilities involve managing a staff of six governed by a Distribution Committee (McCune Foundation) with seven members, four of whom are descendants of Charles McCune's younger brother John. With current assets of approximately \$340 million, the Foundation will make grants this year of approximately \$22 million. All of these will be to organizations located in western Pennsylvania, and operating programs there for the benefit of western Pennsylvanians. The Foundation continues to award grants across the entire program spectrum, including private education, health and human services, the humanities (that includes culture and historic preservation), and civic affairs (that also includes community and economic development).

Kenya T. Boswell **BNY Mellon**

Kenya T. Boswell is BNY Mellon's Charitable Giving Manager for the southwestern Pennsylvania region, where she's responsible for managing Corporate, Tax Credit and Foundation investments that support the company's philanthropic, business and Community Reinvestment Act (CRA) objectives—which include community development services. Ms. Boswell led a Global Philanthropy Team in the development and implementation of BNY Mellon's \$6 million Powering Potential Global Workforce Development Signature Program focused on creating measurable change on the education and employment outcomes of youth ageing out of foster care.

Prior to joining BNY Mellon in February 2008, Kenya served as the Senior Community Relations Representative for Duquesne Light, where her responsibilities included managing the company's signature Partners in Education program, developing innovative signature initiatives, such as the Power of Warmth, that supplied new coats for at-risk youth to community partners for distribution, and identifying opportunities for executive volunteerism.

SPEAKER BIOGRAPHIES

Dr. John E. Brothers, MBA, MPA, LP.D, CFRE **Quidoo Consulting**

John Brothers is a recognized leader in the nonprofit and philanthropic arena with over twenty years of sector experience and is a national expert in the field of capacity building, executive leadership, nonprofit effectiveness, sustainability and assisting organizations in both organizational growth and decline.

Dr. Brothers, a Certified Fund Raising Executive (CFRE), is also the Principal of Quidoo Consulting, a social enterprise servicing nonprofit, philanthropic and government efforts throughout the U.S. and internationally. Quidoo Consulting has been contracted by hundreds of nonprofit and philanthropic organizations and Dr. Brothers has trained or spoken to thousands in all areas of philanthropy, public policy, capacity building and organizational development.

Dr. Brothers has a Doctorate in Law and Policy from Northeastern University, an MPA in Nonprofit Management from New York University and an MBA in Public Policy from American Public University from which he started at Columbia University. He has taken additional studies at Georgetown University and the London School of Economics. He is an adjunct professor in social welfare policy at Rutgers University and in nonprofit and philanthropic studies at New York University. Dr. Brothers served as a Visiting Scholar at the Hauser Center for Nonprofit Organizations at Harvard University and has served in several fellowships, including the Higher Education Consortium for Urban Affairs, the Children's Defense Fund and the Rockefeller Foundation.

Diana Angela Bucco **The Buhl Foundation**

Diana Bucco is the Vice President of The Buhl Foundation where her primary responsibilities are strategy formation and capacity building. She was formerly the President of The Forbes Funds, a supporting organization of The Pittsburgh Foundation, which builds the capacity of the nonprofit sector through grant making, applied research and sector leadership. During her tenure The Forbes Funds has strengthened its role as intermediary among nonprofits and philanthropists seeking to support the organizational capacity of the nonprofit sector. Through her work The Forbes Funds has become a leader in supporting Strategic Restructuring, Financial Modeling and Advocacy on behalf of the nonprofit sector. During her tenure, the Greater Pittsburgh Nonprofit Partnership (GPNP) has been nurtured to become a unified voice for the nonprofit sector. As a membership coalition of 350 nonprofit organizations representative of the sector, the GPNP has become a critical voice among national, state and local legislators.

Prior she was a founding Co-Director and Executive Director of the Coro Center for Civic Leadership.

Kristen Ace Burns **The Grable Foundation**

Kristen Ace Burns is the Associate Director at The Grable Foundation, which is dedicated to improving the lives of children in southwestern Pennsylvania. Ms. Burns works to identify and support high-performing nonprofits that target the needs of the region's children and their families. She leads Grable's efforts in the early childhood field, including early learning programs, professional development strategies, and support for parents of young children. Her grantmaking portfolio also includes girls' issues, STEM education, and social services for children and families. In addition, she works closely with Grable's Executive Director to manage aspects of the foundation's operations.

Prior to joining The Grable Foundation, Ms. Burns served as President of REDF (formerly The Roberts Enterprise Development Fund), a San Francisco-based venture philanthropy organization that creates jobs and employment opportunities for people with the greatest barriers to work. In 2008 she was appointed by Pennsylvania Governor Ed Rendell to serve on the state's Early Learning Council.

Al Condeluci, PhD **UCP/CLASS**

Al Condeluci is CEO of UCP/CLASS, a community based support system for folks with all types of disabilities in Pittsburgh, PA. He holds an MSW and PhD from the University of Pittsburgh, where he is on faculty in the School of Health and Rehabilitation Sciences and the School of Social Work. He has authored 7 books, including the acclaimed, *Interdependence: The Route to Community* (1991) and the newly released, *Together is Better* (2009).

Deanna M. Conte **Alpern Rosenthal**

Ms. Conte has nearly 20 years of audit & assurance experience which includes work for a national firm in Pittsburgh. Ms. Conte has been with Alpern Rosenthal for nearly 15 years.

Ms. Conte has experience and expertise in providing professional services to not-for-profit organizations as well as to companies in the advanced technology industry. She is deeply committed to serving entities in these two industries as they both pioneer to enhance the quality of human life through a spectrum of providing social services to developing innovated medical devices, advocate or create products that help protect the environment, and promote corporate and human growth through focusing on innovative and entrepreneurial trends such as life science innovations, corporate social responsibility, venture philanthropy, advocacy for the arts and technology, sustainable businesses and social enterprise.

SPEAKER BIOGRAPHIES

Michele Rone Cooper **McAuley Ministries**

Michele Rone Cooper is executive director of McAuley Ministries, the grantmaking arm of the Pittsburgh Mercy Health System. McAuley Ministries was established by the Sisters of Mercy in 2008; Michele was responsible for the start-up of the foundation, including establishing the strategic plan for McAuley Ministries and developing its governance and grantmaking processes.

McAuley Ministries focuses on the Hill District, Uptown and West Oakland neighborhoods in Pittsburgh, and on initiatives that address health and wellness, community development, and education. McAuley Ministries' vision is to be known as a "good neighbor" whose support has contributed to neighborhoods that are safe, vibrant, and celebrated, and where residents are healthy and enabled to reach their full potential.

Michele manages an annual grantmaking budget of \$2.3 million. Since its inception, McAuley Ministries has awarded more than 250 grants with awards totaling over \$9.8 million.

Dave Coplan **Mon Valley Providers Council**

Dave Coplan is the Executive Director of the Human Services Center and Director of the Mon Valley Providers Council. The Human Services Center was honored as the recipient of the 2004 Wishart Award for Excellence in Nonprofit Management awarded by The Forbes Funds of The Pittsburgh Foundation. In 2012, Dave was the inaugural recipient of the statewide CAAP Sargent Shriver Community Service Award. In 2010 the University of Pittsburgh's School of Social Work honored Dave as its Outstanding Field Instructor, an honor of great meaning to him for his role as a mentor to those entering the field. In 2009 the University of Pittsburgh's Graduate School of Public and International Affairs honored Dave as one of its inaugural 4 Under 40 recipients and in 2007, Dave was recognized as one of Pittsburgh's 40 Under 40 by *PUMP* and *Pittsburgh Magazine*.

Marla Cornelius **CompassPoint Nonprofit Services**

Marla Cornelius, MNA, is a Senior Project Director at CompassPoint Nonprofit Services. She developed and manages several of CompassPoint's nonprofit management and leadership programs and research projects. She co-authored the national research report *UnderDeveloped: A National Study of Challenges Facing Nonprofit Fundraising* (2013). She also led the development of the studies *Ready to Lead? Next Generation Leaders Speak Out* (2008) and *Daring to Lead 2011: A National Study of Nonprofit Executive Leadership*. She develops content, trains, and consults in the areas of individual and organizational leadership and governance.

John Denny **Denny Civic Solutions, Campaign for What Works**

John Denny has spent a career transforming ideas into action. From his days as one of the youngest people in the United States to manage a statewide presidential campaign, to his work building an organization that aids at-risk youth and nonprofits, John and his team create results.

Denny works to create positive change by managing civic campaigns and engineering public policy. With decades of hands-on expertise, he knows how to foster an idea from inception to execution. With his experience as a former national political campaign manager and consultant, he thoroughly understands how to create a message, target its focus, and move audiences to support or oppose an initiative, idea, or piece of legislation.

A constant throughout John's career has been his work supporting and representing community and political leader Elsie Hillman. He has served as a special assistant and consultant to Mrs. Hillman, as well as director of community relations for the Hillman Company, representing their interests in the foundation community. His work for Mrs. Hillman has spanned three decades and has involved leadership on a broad range of initiatives critical both to her and the community, touching the lives of thousands of people in the process.

Colleen O. Fedor **The Mentoring Partnership**

Colleen O'Donnell Fedor is the Executive Director of The Mentoring Partnership of Southwestern Pennsylvania. Mrs. Fedor has a B.S. in Education and has more than thirty years experience in positions associated with youth and families. She previously worked for the Sewickley Valley YMCA in a variety of positions including 10 years as the Associate Executive Director.

Professionally, she has been chosen as a Distinguished Member of the National Society of Collegiate Scholars and serves on a number of advisory boards including her role as an Advisory Council member for MENTOR/The National Mentoring Partnership, the Greater Pittsburgh Non Profit Partnership where she is the Past-Chairperson, the Pittsburgh Harlequins Rugby Football Club, Family Tyes and Amachi Pittsburgh.

SPEAKER BIOGRAPHIES

Kevin Gieder **Environmental Collaborative**

Kevin Gieder is the Chief Financial Officer of The Environmental Finance Collaborative, a year-old talent-sharing initiative that provides four environmental non-profit organizations (Construction Junction, GTECH Strategies, Nine Mile Run Watershed Association and Tree Pittsburgh) with high level strategic and operational finance capabilities.

Kevin is responsible for providing operational financial advice and oversight, budgeting and business planning expertise, support and advice for the boards of directors and the adoption of best practices in financial management.

Prior to joining The Environmental Finance Collaborative, Kevin spent 10 years with H.J. Heinz Company World Headquarters in a variety of senior finance roles and 7 years in the audit practice of a regional CPA firm.

Donald H. Goughler **Family Services of Western Pennsylvania**

Donald H. Goughler is President and Chief Executive Officer of Family Services of Western Pennsylvania and has operated in that position since 1999. He is a licensed Social Worker and a graduate of Westminster College, where he received a Bachelor's Degree in Speech, and the University of Pittsburgh, where he received a Master's Degree in Social Work. In 1998, Goughler was recognized with a Distinguished Alumni award by Westminster and currently is a part time faculty member at the University of Pittsburgh School of Social Work where he teaches graduate courses in Management.

Goughler has served on several nonprofit boards and advisory councils and, currently, serves on the board of trustees of the national organization, Ways to Work, and has chaired a national gerontology initiative, New Age of Aging, conducted by the Alliance for Children and Families.

Kimberly Griffith **Alpern Rosenthal**

Ms. Griffith is a co-director of the Alpern Rosenthal's Not-for-Profit Services Group, which specializes in providing audit, tax and business consulting to more than 150 not-for-profit clients. She has more than 25 years of public accounting experience, concentrating her time serving not-for-profit entities. Kim undergoes 24 hours of specific government-related accounting and audit training every two years, which focuses on the particular business challenges confronting not-for-profit organizations. She is a frequent speaker on not-for-profit topics in the Pittsburgh charitable community.

Suguru Ishizaki, Ph.D. **Carnegie Mellon University**

Suguru Ishizaki is an Associate Professor of Rhetoric and Communication Design in the Department of English at Carnegie Mellon. Before this appointment, he worked at QUALCOMM on the research and development of mobile user interfaces. Prior to that, he was on the faculty of the School of Design at Carnegie Mellon University. Suguru has over 25 years of scholarly and practical experience in visual and interaction design, and basic research on visual and verbal communication and rhetoric. His current research focuses on communication design pedagogy for non-designers.

Suguru is an elected member of the IEEE Professional Communication Society's administrative committee, and serves as the chair of its education committee. He also serves as the vice president of the Pittsburgh Mandolin Society.

He is the author of *Improvisational Design: Continuous Responsive Digital Communication* (MIT Press, 2003), and a co-author of *The Power of words: Unveiling the Speaker and Writer's Hidden Craft* (Erlbaum 2004), and *Arab Women in Arab News: Old Stereotypes and New Media* (Bloomsbury 2012). He earned his Ph.D. and M.S. from MIT's Media Laboratory, after receiving his Bachelor Art & Design from Tsukuba University, Japan.

Karris Jackson **POISE Foundation**

Born and raised in Pittsburgh, Pennsylvania, Ms. Jackson has a Bachelor's of Arts in English and Secondary Education from Allegheny College in Meadville, Pennsylvania and a Master's of Science degree in Secondary School Administration from Duquesne University. Ms. Jackson also attended Harvard University where she completed an Executive Education Class in Non-profit Management. Prior to joining the POISE Foundation, Ms. Jackson was the Executive Director of Urban Youth Action, Incorporated (UYA) and before working at Urban Youth Action, she was the Chief Administrative Officer of a charter school located in Harrisburg, PA.

Ms. Jackson is a founding member of the Sankofa Fund Giving Circle and is currently a Connecting Leaders Fellow with the Association of Black Foundation Executives (ABFE). She is a board member of Allegheny County Youth Creations, Inc., a member of the Youth Policy Council, on the Advisory Committee for BNY Mellon's Powering Potential Program and a graduate of Leadership Pittsburgh XXV. Ms. Jackson was a School Board member for the Cornell School District for six years and served as President for two of those years. She has received numerous awards including 40 under 40, the New Pittsburgh Courier's 50 Women of Excellence and the Pittsburgh Pirates Community Champion Award.

SPEAKER BIOGRAPHIES

Wayne Jones **The Heinz Endowments**

Wayne Jones is a senior officer with The Heinz Endowments' Children, Youth & Families Program. His grant-making portfolio seeks to increase learning opportunities for adolescents during non-school hours to nurture their development as individuals and members of larger communities. Wayne is particularly interested in developing systemic approaches to improving the quality, quantity and utilization of after-school and youth development programs. He is currently working with state and regional efforts toward these goals.

Wayne also coordinates the Endowments' annual internship program. This full-time summer work experience provides recent high school graduates with a hands-on opportunity to learn about philanthropy's role in southwestern Pennsylvania. The interns work in teams to develop grant-making initiatives, ultimately awarding \$200,000 in youth-driven grants. In addition, the interns create radio, photography, video and written pieces that express their perspectives on critical issues facing the community.

Jacqueline Garry Lampert **Lake Street Strategies, LLC**

Jacqueline Garry Lampert is the founder of Lake Street Strategies, LLC, a public policy strategy and consulting firm. Lake Street Strategies assists clients in breaking down complex health care issues into manageable, fundamental elements and in developing health care policy platforms that position clients for success in a changing business environment. Before founding Lake Street Strategies, Ms. Lampert served as senior health policy analyst at UPMC Health Plan.

Previously, Ms. Lampert served as health policy advisor at the U.S. Senate Democratic Policy Committee (DPC), where she represented the Senate Majority Leader in negotiations to draft and pass the Affordable Care Act and also provided policy analysis, led caucus health staff through the legislative process, and created briefing and message materials for use by the Democratic caucus.

Frederick H. Leasure **Alpern Rosenthal**

Over his thirty plus years of experience in the field, he has assisted numerous organizations initiate and upgrade their planned giving programs. A frequent lecturer in the area of planned giving, Mr. Leasure has served as the Chair of the Magee Women's Health Foundation, Vice Chair of the West Virginia Wesleyan College Board, Past President of the Western Pennsylvania Chapter of the former National Society of Fund Raising Executives and President of the National Association of United Methodist Foundations.

JunLei Li **The Fred Rogers Company & University of Pittsburgh Office of Child Development**

Junlei Li, Ph.D, serves as the Principal Research Scientist at the Fred Rogers Company and Senior Fellow at the University of Pittsburgh Office of Child Development. Through his work with urban classrooms, community programs, and orphan-ages, he has drawn several simple lessons learned. Enriching interactions with another human being is the most important ingredient in a child's development. Promoting a connected community should be the overarching aim of social advocacy on behalf of children. Real and lasting change can start with finding what ordinary people do extraordinarily well with children in everyday moments. He aims to integrate the scientific disciplines of child development, education, communication, and social change into efforts by the Fred Rogers Company to support professionals who serve children.

He graduated from Carnegie Mellon University with a doctorate in Psychology and M.S. in Instructional Science, and University of Notre Dame with a B.S. in Computer Science.

Tony Macklin **Roy A. Hunt Foundation**

Tony Macklin is the executive director of the Roy A. Hunt Foundation, a 50-year-old family foundation based in Pittsburgh, PA. He joined the Foundation in 2011 after doing independent consulting for national and local foundations and nonprofits. He previously served for 12 years at the Central Indiana Community Foundation (grantmaking, community initiatives and partnerships, and philanthropic advising) and for six years at the State of Indiana's Community Development Division. He's a native Hoosier, a son of a family of entrepreneurs, an amateur musician, served on more committees and boards than he can remember, and a founding trustee of the Awesome Foundation's chapter in Pittsburgh.

Polina Makievsky **Alliance for Children and Families**

Polina Makievsky is the senior vice president of knowledge, leadership, and innovation for the Alliance for Children and Families, a national nonprofit association representing over 300 nonprofit human service organizations around the country united by a vision of a healthy society and strong communities for all children, adults and families. In her current role at the Alliance, Polina manages the organization's portfolio of leadership development, knowledge management, program replication and evaluation services designed to help member organizations strengthen their capacity in achieving their missions.

Polina's career in the nonprofit sector has spanned program development and leadership in international development in

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the former Soviet republics; direct service work in grassroots community-based institutions; and policy and program replication work with national organizations including the National Human Services Assembly and the Points of Light Foundation.

Jesse James McLean, Jr. **Every Child, Inc**

Mr. Jesse J. McLean Jr. received his Bachelor of Arts Degree in 1983 and his Masters of Arts Degree in 1994 from California University of Pennsylvania. In addition to building a successful career as a counselor, administrator and national diversity/conflict resolution trainer, Mr. McLean has developed the California University's V.U.L.C.A.N. program.

V.U.L.C.A.N., an acronym for vision/goal setting, understanding/respect, leadership, civility, academics and nutrition, is an effective partnership between the university and the V.U.L.C.A.N. students, for preparing them for success throughout their high school and college careers. Mr. McLean works with the public school administrators, teachers, students, parents and California University's administrators and professors to develop a system of academic and behavior monitoring, which assist the student to reach his/her maximum potential.

Michelle McMurray **Mental Health America Allegheny County**

Michelle McMurray, MSW, LSW currently holds the position of President & CEO at Mental Health America Allegheny County (MHAAC), a mental health advocacy organization. Ms. McMurray's mental health experience is diverse. She has 10 years of professional experience in the mental health field which includes organizational management, training, community outreach, program development, conducting psychiatric evaluations, providing therapy, case management and community-based research.

Michelle's professional interests include improving the recognition and treatment of mental illness to reduce health disparities, the integration of mental & physical health care and community education about mental illness to eliminate stigma. Michelle is the co-author of several scholarly articles and has conducted numerous workshops for professionals and lay audiences on these topics.

Michelle was born and raised in Fairmont, WV but moved to Pittsburgh to attend the University of Pittsburgh where she earned a Bachelor degree in Sociology and a Master of Social Work degree. Pittsburgh quickly became home for Michelle, who never considered moving after graduation. Outside of work, Michelle enjoys reading contemporary fiction, watching football, and traveling. Most of all, Michelle enjoys spending quality time with her husband of four years, Darrell McMurray and their 3 year old son, Trey McMurray.

Alex Matthews **Highmark**

Alex Matthews is Senior Community Specialist in the office of community affairs with Highmark Inc. He oversees the coordination of Highmark's volunteer and employee engagement. In this role, Alex seeks to find volunteer opportunities that will have an impact on Highmark volunteers to increase volunteerism and overall community engagement.

Prior to working at Highmark, Alex founded and was President of Matthews Insurance Group, a full service insurance agency. His purpose for the insurance agency was to educate and provide quality insurance at reasonable prices to the community.

Alex's passion for children led him to serve as an elected member of the Pittsburgh Board of Education for twelve years. He also served on various state and national educational committees.

Debra B. Natenshon **The Center for What Works at The Rensselaerville Institute**

Debra Natenshon is an influential leader in the field of outcome-based thinking and practical management. Together with the Urban Institute, she completed ground-breaking research to develop outcome frameworks that are in use by a wide spectrum of foundations and nonprofit organizations around the globe. She bridges research with practice in highly effective engagements across the social sector.

In 2004, Debra successfully re-launched The Center for What Works' strategy and infrastructure and led all efforts until March 2011, when she and What Works joined forces with the outcome consulting group of The Rensselaerville Institute.

Debra's expertise in assisting social sector organizations to improve their results makes her a highly sought after advisor and speaker. She makes essential connections between strategy and actionable outcomes leading to improved internal management, increased external funding, and continuous improvement.

David Neff **PriceWaterhouseCoopers, Lights. Camera. Help.**

Simply put, David Neff helps people and nonprofits for a living. As a digital marketer, content strategist, digital engagement pro and online campaigns expert David has been living in the digital and nonprofit world for over thirteen years. He currently works as a Senior Associate at PriceWaterhouseCoopers in Austin, TX where he works with Fortune 500 brands on the customer impact of digital strategy and digital engagement. He is also the author of the *The Future of Non-profits: Thrive and Innovate in the Digital Age* (Wiley May of 2011) and author of *501derful.org* one of the longest running

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SPEAKER BIOGRAPHIES

and most popular blogs for nonprofit technology and media. He is also the creator and co-founder of Lights. Camera. Help. the world's first nonprofit focused on cause driven and nonprofit filmmaking. He is currently the past-president of the Social Media Club Austin.

Grant Oliphant **The Pittsburgh Foundation**

Grant Oliphant is President and Chief Executive Officer of The Pittsburgh Foundation, one of the largest and oldest community foundations in the United States. He moved to the region's community foundation in March 2008 from The Heinz Endowments, one of the nation's leading private family foundations.

Grant, who is the Foundation's fourth head in its 66-year history, has led a major transformation in the organization's engagement of key constituents, its efficient stewardship of its assets and the development of ground-breaking initiatives to enhance services for donors and maximize grantmaking impact in the regional community.

This has included the launch of the Pittsburgh Promise scholarship program for the students of the Pittsburgh Public Schools, and the development of PittsburghGives, an on-line giving and research portal that has raised \$13.5 million in two years for local nonprofits with special Day of Giving events. Grant frequently leads community conversations around critical issues and he has taken a prominent role in building advocacy programs to support the work of local nonprofits and the families and individuals they serve.

Todd Owens **Vantagen**

Todd Owens has over 13 years of experience in nonprofit consulting and CEO level executive search and transition management. Due to a merger with ParenteBeard in 2011 he is now a member of the Vantagen team of HR professionals. Todd manages the nonprofit consulting services team in Pittsburgh whose main focuses are executive search, succession planning, change management, executive and founder transitions, and interim executive leadership. Prior to holding this position, Todd was a Partner and Senior Consultant with Dewey & Kaye serving clients as a project manager, facilitator, and organizational development consultant.

Todd is the Founder of NonprofiTalent – a web and social media platform that connects nonprofits with talented individuals interested in working, volunteering and serving as interns with good causes where they can leverage their skills for good.

Christina Perry **Purpose Built Communities**

Christina Perry serves as a Community Development Advisor for Purpose Built Communities. Prior to this role, Christina joined Teach For America as a teacher in 2010. In 2012, Christina was selected as a region finalist in the Sue Lehmann Excellence in Teaching award competition (National Teach For America Teacher of the year award). She was also the first special educator to be selected by Teach For America to illustrate transformational teaching and learning on a national level (as part of the Teach for America video campaign, One Day for SPED). Her work will be used by new special educators across the country in their training and development. She graduated from Roanoke College and earned a B.A. in Political Science.

Laura Quinn **Idealware**

Laura has been working in the software sector for almost 20 years. As Idealware's Executive Director, she directs Idealware's research and writing to provide candid reports and articles about nonprofit software, including their extensive research in partnership with MAP for Nonprofits into the factors that make technology innovation successful for Minnesota nonprofits. Prior to Idealware, Laura founded Alder Consulting, where she helped nonprofits create Internet strategies, select appropriate software, and then build sophisticated websites on a limited budget. She has also selected software, designed interfaces and conducted user research for multi-million dollar software and website implementations with such companies as Accenture and iXL. Laura is a frequent speaker and writer on nonprofit technology topics.

John Rhoades **United Way of Allegheny County**

John Rhoades is currently focused on two main initiatives at the United Way: Helping manage the Campaign for What Works – a statewide civic effort that promotes government funding for human services programs that work for providers, clients and taxpayers

Facilitating the creation of an independent umbrella child advocacy organization for Southwestern Pennsylvania called Allies for Children

John has been involved in public affairs since he returned to his hometown of Pittsburgh six years ago. When he first arrived back, John took a position working on policy in the office of his city councilperson. From there, he broadened his experience by working and volunteering on a variety of community development and public policy projects, from assisting Peabody high schoolers through summer employment to developing a micro-loan program for low-income entrepreneurs in the area.

SPEAKER BIOGRAPHIES

David K. Roger **Hillman Family Foundations**

David K. Roger is the President of Hillman Family Foundations—a private foundation that administers 18 distinct, constituent foundations associated with the Hillman Family. In this capacity, he serves as a Director and President of the Hillman Foundation, Henry L. Hillman Foundation, Elsie H. Hillman Foundation, and Mary Hillman Jennings Foundation—all of whose missions' are to improve the quality of life in Pittsburgh and southwestern Pennsylvania.

Since joining the foundation in 2001, he has been involved in numerous projects and initiatives of the organization including the Hillman Fellows Program in Innovative Cancer Research at the University of Pittsburgh Cancer Institute, Hillman Pediatric Transplant Center at Children's Hospital of Pittsburgh, Hillman Center for Future-Generation Technologies at Carnegie Mellon University (CMU), and Traffic21, a smart transportation deployment and research initiative at CMU.

Lisa A. Scales, J.D. **Greater Pittsburgh Community Food Bank**

Lisa A. Scales, chief executive officer for Greater Pittsburgh Community Food Bank (GPCFB), has a long and distinguished career advocating for social justice and helping those negatively affected by hunger and poverty. In her position, Ms. Scales leads an organization that collects and distributes food and grocery items through a network of more than 400 member organizations in 11 southwestern Pennsylvania counties.

Ms. Scales came to GPCFB in 1996 as supervisor of its Green Harvest program. In 2002, she became the Food Bank's chief program officer and was promoted to chief operating officer in 2007. In that role, Ms. Scales was responsible for daily operations of the Food Bank, as well as volunteer programs, agency relations, nutrition services and procurement and marketing of product to member agencies.

Joni Siff Schwager, LSW **Staunton Farm Foundation**

Joni Siff Schwager has been the Executive Director of the Staunton Farm Foundation since 1998. Staunton Farm is a sixth generation family foundation, which has been awarding grants in the field of behavioral health (including substance use and co-occurring disorders) in ten counties in southwestern Pennsylvania since 1937. The Foundation's focus is on improving access to behavioral health care for underserved populations, decriminalizing mental illness and improving behavioral health care in rural areas. Staunton Farm awards about two and a half million dollars in grants each year. Joni is responsible for all aspects of the foundation's operations and supervises three staff.

Joni serves on several boards and advisory committees, some of which are: LEAD (Leading in Education and Awareness about Depression), the regional HIV/AIDS Allocation Committee, which authorizes and distributes about two million dollars per year of federal and state HIV/AIDS funds, the Pennsylvania Health Care Funders Collaborative, and Allegheny County's Mental Health Forensic advisory committee.

Evan Smith **Purpose Built Communities**

Evan Smith brings a strong background in education and training to his position as Community Development Advisor for Purpose Built Communities. After college, he joined Teach For America, teaching initially at Carlos Truan Junior High School, a traditional public school in Edcouch, TX and later at KIPP STRIVE, a public charter school in Atlanta. Evan consistently led his students to significant achievement where they out-paced their peers and their expected academic growth. At Teach For America, first in the Rio Grande Valley of Texas and later in Atlanta, he trained and supported first- and second-year teachers and contributed to national design and training initiatives. A native of LaBelle, FL, Evan graduated from Wake Forest University with a B.A. in both Economics and Political Science.

Steve Sokol **World Affairs Council of Pittsburgh**

Dr. Steven E. Sokol joined the World Affairs Council of Pittsburgh in late June 2010 as President and Chief Executive Officer. In this capacity, he oversees all Council operations, including the development and implementation of some 175 events that reach over 17,000 people annually. Through these events and activities – plus a weekly radio show and webcasts – the Council seeks to foster informed, independent, and critical thinking about important global issues as they affect the nation, the region, and Pittsburgh.

Mr. Sokol has 20 years of experience working with foundations, think tanks, and other non-profit organizations in Europe and the United States – and has spent over ten years working at non-partisan membership-based organizations focusing on a range of domestic and foreign policy issues. Prior to joining the ACG, Steve served as Deputy Director of the Aspen Institute Berlin. He has also worked as the Head of the Project Management Department at the Bonn International Center for Conversion GmbH (BICC) and as a Program Officer at the Berlin Office of the German Marshall Fund of the United States.

SPEAKER BIOGRAPHIES

Jordana Stephens **Eden Hall Foundation**

Jordana Stephens has been a Program Officer with the Eden Hall Foundation for the past nine years. Her primary responsibilities include reviewing proposals and following up with grantees.

Her varied background has always included bringing corporate, education and/or community based organizations together to enhance the Southwest region. Previously, she was the Director of Education for Junior Achievement of Southwest PA. Her other roles included working in the Office of Public Affairs within the Pittsburgh Public Schools, where she was responsible for ramping up and supporting the Parent School Community Councils.

Eric Stoller **The Heinz Endowments**

Eric Stoller joined The Heinz Endowments in 2011 to advance community development in targeted Pittsburgh neighborhoods in a comprehensive fashion. As the Community & Economic Development program officer, his grants portfolio also seeks to empower community members and develop leaders who can advocate for ambitious revitalization strategies. Eric's other responsibilities include serving as a member of the African American Men and Boys Task Force, an internal working group at the Endowments.

Before coming to the Endowments, Eric practiced urban planning in both the government and nonprofit sectors. He fostered citizen-led planning and community improvement activities through several neighborhood-based organizations and collaboratives in Minneapolis and St. Paul, Minn.

Janera Solomon **Kelly Strayhorn Theater**

Janera Solomon, is an experienced producer & curator with an extensive portfolio including: exhibition development and programming for Museum of the African Diaspora; project management, August Wilson Center for African American History & Culture; and audience development/branding, Brooklyn Museum of Art. Her performing arts background includes stints with the Philadelphia Live Arts Festival, and several independent artist projects.

An advocate for arts education, she has developed many community based arts programs and worked as a teaching artist. Her personal and professional experiences include a diverse mix of artistic, educational and cultural planning expertise, and currently serve as the Executive Director of the Kelly Strayhorn Theater, a multi-arts presenter in Pittsburgh.

Frederick W. Thieman, Esquire **The Buhl Foundation**

Frederick W. Thieman was named President of the Buhl Foundation, Pittsburgh's oldest multi-purpose foundation, in June of 2007. A former United States Attorney for the Western District of Pennsylvania, Mr. Thieman arrived at Buhl with an impressive civic and professional background.

Appointed by President Clinton, Mr. Thieman served as the United States Attorney from 1993 to 1997, where he headed an office of 42 attorneys who both prosecuted criminal violations throughout Western Pennsylvania and handled voluminous civil litigation ranging from health care issues and tort liability to employment rights and environmental impact.

While serving as the U. S. Attorney, Mr. Thieman was instrumental in establishing a youth crime prevention effort in Allegheny County that garnered national attention. Over the course of his 30 year legal career, Mr. Thieman practiced as a trial attorney with a specialty in complex business related litigation.

Linda M. Thier **Financial Management Services**

Ms. Thier provides part-time or interim CFO skills to growing or struggling companies. Throughout her extensive financial career she has worked with companies in a wide variety of industries as well as non-profit agencies. From 1996 through 2007 she was a Managing Director with Cornerstone Capital Advisors, a turnaround consulting firm. Ms Thier began her finance career with Ernst & Young where she became a Certified Public Accountant.

Ms. Thier has been on the board the Women's Center and Shelter since 1986 where she has been an active member assuming various officer positions. She also currently sits on the board of Hosanna House. Ms Thier is also treasurer of her church where she is an active member.

Amanda Trocki **Pittsburgh Cares**

Amanda Trocki is the Director of Corporate Programs at Pittsburgh Cares, where she works to engage corporate partners in meaningful volunteer service. Passionate about service and the city of Pittsburgh, Amanda is constantly seeking new and creative ways to get others and herself involved and giving back.

When she's not working, Amanda can be found cooking, trying out new DIY projects, or empowering teen girls through mentorship. Amanda holds a Bachelors of Science degree in Interior Design from La Roche College and is an alumna of Public Allies Pittsburgh.

SPEAKER BIOGRAPHIES

Kurt M. Ulrich **Huntington Insurance**

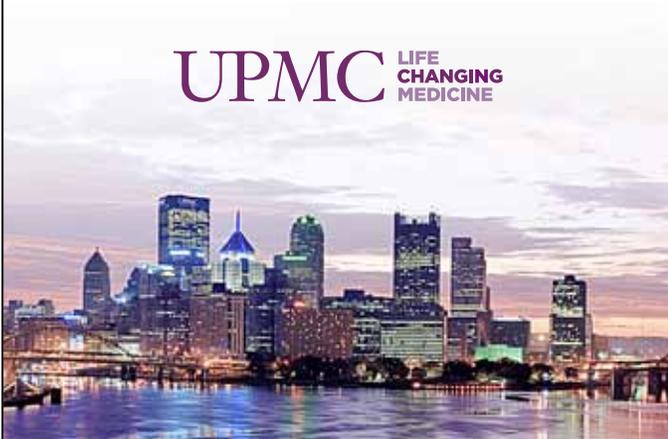
Kurt is a native of Pittsburgh and has 26 years of experience in the health care and employee benefit industries. He began his professional career as an exercise physiologist and program director for a cardiac rehabilitation in a community hospital in Ithaca, NY. Kurt returned to Western Pennsylvania in 1986 and spent another 8 years in the health care setting before beginning his work in the insurance industry.

At Huntington Insurance, Kurt specializes in health, life and disability insurance. His clients include manufacturers, health care providers and not-for-profit agencies. He is detail oriented and brings strong analytical and financial skills to finding creative solutions to his clients' needs to control their benefit costs while offering a competitive benefits package.

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HEALTHY KIDS FOR A HEALTHY COMMUNITY

fitUnited Pittsburgh, an exciting new initiative launched by United Way of Allegheny County, aims to improve the health of our children by mobilizing and motivating our community.

Key objectives are to increase physical activity levels and improve nutrition in children from birth to age 12.

To learn more, or to get involved, visit our website: www.uwacfitunited.org. Follow us on Twitter @fitUnitedPgh



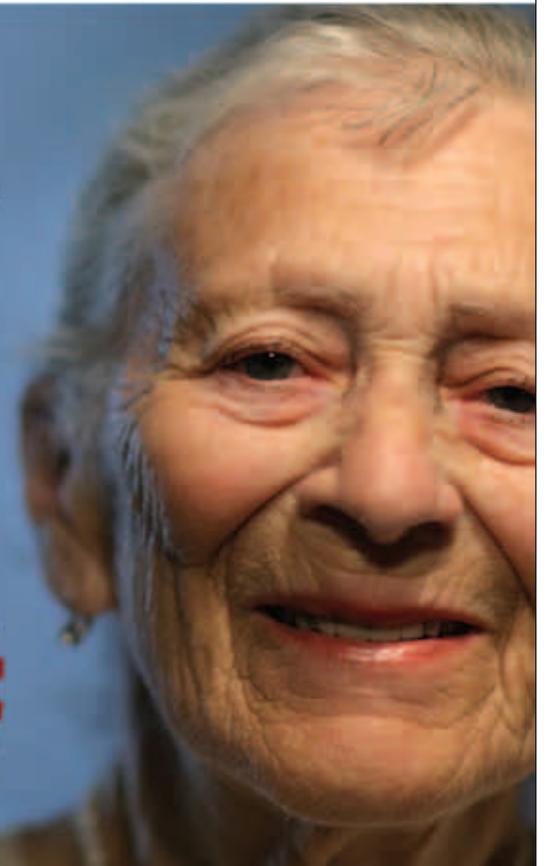
Throughout Pennsylvania, hundreds of effective programs keep children safe, protect our citizens with mental health issues, support seniors and adults with disabilities, and help families struggling to put food on the table.

When these efforts work, they prove to be a sound investment for Pennsylvania taxpayers.

The Campaign for What Works is a statewide civic effort created to support publicly funded, human and social service programs.

To learn more about the Campaign for What Works or to take action now, visit www.campaignforwhatworks.org or email 4whatworks@gmail.com.

The Campaign for What Works is a project of The Pittsburgh Foundation, United Way of Allegheny County and the Greater Pittsburgh Nonprofit Partnership.



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