

CONSULTANT BIOS



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Thad Calabrese
Assistant Professor, School of Public Affairs

Prior to entering academia, Thad worked in the government sector (for the New York City Office of Management and Budget) and then in the nonprofit sector. This included work at Burchman, Terrio, and Quist, a full-service financial management outsourcing company for nonprofit organizations. There, he assisted clients in budget preparation, financial statement preparation, medical billing, audit preparation, banking relationships, and internal control management. Thad also worked as a consultant for the Blue Ridge Foundation of New York, primarily assisting grantees (startup nonprofits) in establishing sound financial management practices early in their lifecycles.

Thad's dissertation focuses on nonprofit finance, and he was awarded the Association for Research on Nonprofit and Voluntary Sector Association's Emerging Scholar Award in 2008. He currently teaches Budgeting, Accounting, and Financial Analysis at SPA, and looks forward to teaching other financial management courses in the future.

David G. Clough
Director, Endowment and Planned Gifts, Educational Broadcasting Corp.

David Clough is Director of Endowment and Planned Gifts at Thirteen/WNET New York. In his 30 year planned giving career, David has directed the planned giving programs for universities, performing arts organizations and for The Seeing Eye. He has also served as a consultant to a wide variety of charitable organizations ranging in size from small community hospitals to large universities. As a volunteer, he has been president of both the Planned Giving Group of Greater New York and the National Committee on Planned Giving and has been a board member of a private school and a synagogue in Brooklyn, NY.

Scott Coopersmith
Financial Advisor, Smith Barney

Scott dedicates himself to helping individuals and organizations stay focused on their missions and living their values. He is a Financial Advisor at Smith Barney and was recruited there after gaining corporate, entrepreneurial as well as not-for-profit experience.

Prior to joining Smith Barney, Scott was the Marketing & Communications Manager at CAMBA. CAMBA is a non-profit agency that provides services that connects people with opportunities to improve their quality of life. Scott's greatest accomplishment during his tenure there was to lead and manage a naming and branding project that better positioned the agency to raise private funds.

Scott was the principal and marketing director at *ScoopNet* Media, Inc., a company whose mission was to assist clients in the development of online marketing strategies and provide technical consulting services, while in graduate school. Scott began his career in 1998 in the Entertainment & Media Division at Marsh USA, a Marsh & McLennan Company. He administered the property/casualty insurance programs for various organizations including

many not-for- profits.

Outside of his professional life, Scott volunteers with the Alzheimer's Association, CampInteractive's Young Executive Board and the Ithaca College Hillel. He served as President of the Alzheimer's Association NYC Junior Committee for two years, and participates in the Association's Memory Walk as well as Public Policy Forums/lobbying days. Scott is a member of the board of directors of the Ithaca College Hillel.

Scott grew up in Sullivan County, New York. He obtained a Bachelor of Science degree in Finance from Ithaca College and a Master of Arts in Media Studies degree from the New School. Scott resides on the Upper East Side of Manhattan with his wife Lori.

John Corwin

Interim Chief Executive for Nonprofits, Corwin Consulting, LLC

Mr. Corwin has worked for his entire 36-year career in the nonprofit/public interest sector. Through Corwin Consulting, LLC, founded in 2002, he serves as interim CEO for nonprofits undergoing leadership transition. He recently completed his seventh client engagement in this role, as interim CEO at Reach Out and Read, in Boston. He has also been Interim CEO at the American Liver Foundation, an organization with 25 chapters nationwide; Learning Leaders, Inc., a nonprofit which recruits, screens, trains and supports over 14,000 school volunteers helping students in over 900 NYC public schools; The Valley, a youth services agency in Harlem; the Community Health Care Association of New York State (CHCANYS); the US Committee for the UN Population Fund (now called Americans for UNFPA); and the African Medical & Research Foundation (USA). Earlier, he was Executive Director of The Glaucoma Foundation. Previously, Mr. Corwin practiced public interest law, at The Legal Aid Society, the Center for Constitutional Rights, and the New York Attorney General's office, where he was Chief of the Consumer Frauds and Protection Bureau. Mr. Corwin served for four years on the Greater New York AFP Chapter's Board of Directors, and for six years as a member of the Public Service Network Committee of the NYC Bar Association. He is currently a member of BoardSource and Governance Matters, and is affiliated with the Support Center for Nonprofit Management. Mr. Corwin graduated from M.I.T. and Harvard Law School. Since changing careers, Mr. Corwin has also provided career counseling to hundreds of individuals.

Michael Davidson

Chair, Governance Matters; Consultant, Nonprofit Management Services

Michael Davidson is a consultant specializing in board development with over 20 years' experience in nonprofit board and managerial leadership.

He has worked with the boards of directors of more than 40 nonprofit organizations in the metropolitan area in strategic planning, board training, retreat facilitation and transition management. He is currently the lead consultant for the United Way Linkages program and the Chair of Governance Matters.

He is also a member of the faculty of the Milano School of Nonprofit Management of New School University and of the Heyman Center for Philanthropy and Fundraising at New York

University.

He has also been a Peace Corps Volunteer, an Assistant Professor of Anthology, an Assistant District Attorney and an attorney in private practice. He holds a BS in mathematics from New York State University College on Long Island, a JD from Columbia Law School and an M. Ph. from Yale University.

Further information: www.michaeldavidson.biz and www.governancematters.org

Joseph DiFilippi
Senior Vice President and CIO, LISC

Results-oriented Senior Executive with 20+ year's progressive experience in the nonprofit arena. Excels in strategic planning with proven ability to identify and capitalize on opportunities to drive revenue, streamline operations, optimize working capital and reduce operating expenses. He is a skilled communicator and leader with a reputation for forging business partnerships and motivating cross-functional teams to succeed in achieving business objectives. Experienced in business analysis, data management and leveraging technology to support organizational goals.

Core Competencies

Finance Management ▪ IT/IS ▪ Team Building & Leadership ▪ Human Resources
Procurement & Inventory Management ▪ Training & Coaching ▪ Operating Policies &
Procedures ▪ Grants Management ▪ Social Entrepreneurship

David Dring
Co-Founder, The Interactive Aging Network

David Dring is the executive director of the Interactive Aging Network, a non-profit strategic consulting firm advancing aging services with technology. The firm enables organizations to effectively apply information technology to expand and enhance organizations ability to quality services to older adults. IANet specializes in conceptualizing and incubating web-based services that help clients meet the needs of more older adults who need more complex care at lower costs. solve its clients' unique challenges. With its knowledge and experience of older adults and those that serve them use of technology, IANet offers a distinct service with its usability insights and proven technical ability. Its work spans from strategic planning at community-based organizations to building state-wide data management systems to incubating online tools to support benefit take-up throughout Northern Ireland.

David led the team that created the award winning BenefitsCheckUp Initiative, a service of the National Council on Aging. He also led the creation of Your Long-Term Calculator, a decision support service used by the Centers for Medicare and Medicaid Services to help users of www.medicare.gov understand their long-term care options. These decision support services are examples of the value that information technology can bring to delivering quality services to the increasing complex challenges facing organizations serving older adults.

A sample of IANet's clients include:

- Atlantic Philanthropies
- The Brookdale Foundation Group
- The Burden Center on Aging
- Center for Homecare Policy & Research
- The Health Assistance Partnership
- The NYC Department for the Aging
- The NYC Department of Health, Clinical Systems & Information
- Visiting Nurse Service of New York, Center for Home Care Policy and Research
- UJA - Federation of New York

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Paul Firstenberg

Distinguished Lecturer, School of Public Affairs

Paul B. Firstenberg comes to Baruch with extensive experience in higher education, nonprofit organizations and business. He served as Chancellor of Tulane University, and CFO of Princeton University. He was COO and Trustee of Children's Television Workshop ("Sesame Street"), an Officer of the Ford Foundation, and Executive Director of the American wing of a global nonprofit organization dedicated to education. He also worked for five years in the USAID program, financing private development in the Middle East and Asia, and as a consultant to businesses, nonprofits and the Russian Government seeking to start a private real estate market. In addition, Firstenberg has senior level business experience as Executive Vice President of the Prudential Real Estate Investment Company, Director of International Finance for the Atlantic Richfield Oil Company and as a member of the board of directors of public companies, including the Vanguard Group of Mutual Funds and Sizeler Properties Inc., a REIT.

Paul Firstenberg has authored a series of articles and books including *Managing for Profit in the Nonprofit World*, *The 21st Century Nonprofit* and *Philanthropy's Challenge*. He is currently writing a second edition of *The 21st Century Nonprofit*.

He received his BA from Princeton University and JD from the Harvard Law School.

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Linda Franciscovich

VP for Development and Philanthropic Services, Fairfield County Community Foundation

As VP of Development and Philanthropic Services, Linda Franciscovich oversees a group of professionals who provide philanthropic advice and services to Fairfield County Community Foundation fundholders. She is responsible for implementing fundraising strategies to increase the Foundation's investment and impact in Fairfield County.

Prior to joining the Foundation, Linda was a Managing Director at U.S Trust. As national head of Private Philanthropy, she was responsible for philanthropic services and advised individuals and families on philanthropic planning, including mission and strategy development, governance, generational succession and other aspects of charitable gift planning.

Linda has lectured widely, including speaking at conferences and workshops of the Council of Foundations, The Philanthropy Roundtable, New York Regional Association of Grantmakers, Association of Fundraising Professionals, Financial Women's Association, and the Council for the Advancement and Support of Education (CASE).

She is a Trustee of the Westport Public Library, and a Director of the National Institute for Reproductive Health and the Berthe M. Cote Foundation.

Linda is a graduate of the University of Denver and New York Law School. She was admitted to the New York State Bar in 1983.

Reverend Alfred Gill, Jr.

President/CEO Faith Initiatives Development Corporation

Alfred Gill is the founder and President/CEO of the faith based community development intermediary, Faith Initiatives Development Corporation – FIDC.

FIDC was birthed in July of 2003 and is a national capacity building organization that is the product of Mr. Gill's several years of experience in Business and Non-profit management. A consultant in organizational and community development and having done extensive work with large and small faith based and community development corporations, Mr. Gill has had the opportunity to contribute his talents to various endeavors.

He is the recent former Director of Organizational Development and Training at the Faith Center For Community Development. There he was responsible for the all of the organization's capacity building activities and for assisting in the management of the capacity building grants through the Faith Fund.

He has functioned as the Deputy Executive Director of the Neighborhood Housing Services of New York City, one of New York City's premier housing non-profits. In his role as Chief Operations Officer – COO, he provided oversight on all operations including Homeownership, Lending, Housing Development, Research and Planning, Program Design and Development, Board and Staff Development and the management of nine - 9 satellite offices around the city.

Mr. Gill was a Management Consultant in Organizational Development and Management Systems with Neighborhood Reinvestment Corporation (NeighborWorks® America) where he played a significant role in the rolling out of the network's Customer Relationship Management software, the development of a management systems diagnostic that impacted the NR Network of organizations around the country and the production of a systems approach to performance improvement in the NeighborWorks® Network for the New York/Puerto Rico District.

Alfred, a former businessman, newspaper reporter, financial counselor and sports administrator, has done extensive study in process improvement and organizational development, is a member of the American Society for Quality, a member of the International Consortium of Caribbean Professionals, is certified in the DiSC Personal Profile and is a Business Management graduate of the University of the West Indies – UWI and is completing his Masters in Community and Economic Development at the Southern New Hampshire University.

Ellen Haas

Human Resources Generalist, Credit Agricole Cheuvreux North America

I am a Human Resources professional with 30 years of experience.

After graduating from Hunter College, with a BA in Education and a minor in Speech Pathology, I was a Speech Teacher in the New York City Public Schools for 4 years. I then stayed home with my children and was active in the Parents Association of my children's school serving as President for many years.

I returned to the work force in 1978 as a Recruiter for various Search Firms. In 1987 I made the switch from the search business to corporate Human Resources at The American Journal of Nursing Company where I was the Personnel Director until the Spring of 1988, when I joined Credit Lyonnais, as an Assistant Treasurer/Human Resources Generalist. Over the years I was promoted to Vice President. The company was a branch of the Credit Lyonnais, SA in Paris. We had 383 people when I arrived and over 1000 by 1995. Credit Lyonnais was bought by Credit Agricole in 2004. The Corporate and Investment Bank of Credit Lyonnais was merged with the Corporate and Investment Bank of Credit Agricole and became Calyon. I was responsible for Recruitment, Employee Relations, Relocation, Terminations, Headcount Management, Immigration, etc. I partnered with Senior Management to manage the Human Resources function within their groups. In February of 2008, after 20 years with the bank I decided it was time to retire and pursue some of my personal interests. I was fortunate enough to be offered a part-time position with a small broker dealer as a Human Resources Generalist. I am in charge of the HR function doing what I did before but now I administer payroll and benefits as well.

In 1993 I joined the Volunteer Council of the New York Philharmonic. I was President of the Council from 2005 – 2007 as well as a member of the Board of Directors of the Orchestra for that period.

Kathy Herre

Herre Consulting, Interim Development Director and Development Consultant

Kathy Herre has over 25 years of fundraising and management experience in the non-profit sector working at major international and national organizations as well as with community-based organizations with budgets ranging from \$500,000 to \$200 million. Fundraising experience includes Director, Foundation and Corporate Relations at The International Rescue Committee, Federated Campaign Director at Planned Parenthood Federation of America, and Development Director for an international microfinance organization. Management experience includes director of three homeless shelter programs for women and children, manager of a nationwide teen pregnancy/high school dropout prevention program, and manager of residential youth programs. In 2008, Ms. Herre launched Herre Consulting to provide interim fundraising and management services to non-profits. Most recently she was Interim Vice President for Development at the National Breast Cancer Coalition.

Harvey Hirsch

Senior Vice President-Marketing, Van Eck Global

Harvey Hirsch is Senior Vice President-Marketing for Van Eck Global, a New York City-based investment management firm with approximately \$9 billion in assets under management. At Van Eck he and his 11-person team are responsible for marketing the firm's mutual funds, exchange-traded products, insurance portfolios and institutional funds and accounts.

Prior to joining Van Eck, Mr. Hirsch worked as an independent financial-services consultant for 10+ years. He consulted in the areas of business strategy, marketing, product development, and sales support for such clients as the American Stock Exchange, Chase Investment Services, Citicorp Insurance Group, Citicorp Investment Group, New York Life, Sage Life, Van Eck Global and Wells Fargo.

Prior to founding his consulting practice, Mr. Hirsch was Senior Vice President of Golden American Life Insurance Company, an issuer of variable products and division of Bankers Trust. He served on the company's six-person executive committee and managed marketing and communications. In addition, he had primary responsibility for the firm's *Managing the Managers Program*, which involved identifying investment categories to pursue and selecting, monitoring, evaluating and, when necessary, terminating advisors.

Mr. Hirsch is a Director of Prospector Funds, a value-focused, mutual-fund company and of Forethought Life Insurance Company of New York. At Baruch he participates in Executives on Campus and the school's student mentoring program. In addition, he has been a guest lecturer in marketing at the School of Public Affairs.

He earned his MBA degree from Northwestern University's Kellogg School of Management and his BA degree from Cornell University.

Mr. Hirsch lives in New York City with his wife Ellen.

Heather Joseph
Volunteer Services Manager, Food Bank for NYC

As the Volunteer Services Manager, Heather A. Joseph oversees the progress and placement of volunteers geared toward supporting the Food Bank For New York City's programs as well as working with member agencies. In this role, Heather is responsible for outreach and development to increase volunteer involvement. To date, Heather has successfully recruited 400+ volunteers for the Food Network New York City Wine & Food Festival, increased volunteer outreach at the Community Kitchen and Pantry of West Harlem and the Food Bank for New York City's signature Senior Programs, and worked to restructure the archiving and volunteer tracking system of all 11 programs she manages.

Prior to her employment with the Food Bank For New York City, Heather served as the Director of Organizational Growth assisting a nonprofit in the beginning stages of becoming a 501(c) 3 and designing the internal office administration—including the development of the Human Resources handbook. Heather has served as Volunteer Coordinator with the New York Legal Assistance Group (NYLAG) and has worked as a Child Protective Specialist with the New York City Administration for Children's Services. Heather is a member of the New York Association for Volunteer Administrators (NYAVA) and Alpha Kappa Alpha Sorority, Incorporated. Heather received a Bachelor of Arts in English and Sociology from Binghamton University and a Master of Science in Nonprofit Management from Milano New School University for Management and Urban Policy.

Debra Keenan
Principal and Founder, DKB Consulting, LLC

Ms. Keenan is Principal and Founder of DKB Consulting, LLC a firm specializing in Executive Coaching and Management Consulting. Ms. Keenan brings a broad range of management, leadership and organizational development expertise to her engagements. In her special brand of coaching she integrates coaching and consulting to create the most effective change program for her clients. Ms. Keenan serves as a leadership coach and consultant for both the non profit and corporate sectors. Clients describe her as an engaged listener who helps them find their own answers. She significantly improves her client's management and leadership effectiveness by empowering them to move beyond their current reality by focusing on how to achieve their personal and professional goals.

Ms. Keenan's style of coaching and consulting has led her clients to secure additional funding sources, make strategic hires, establish better relationships with their staff, peers and senior management, increase their overall effectiveness and create high producing and more engaged teams.

Gregory L. King
Principal, Strategic Philanthropy Advisors, LLC

Email: gregory@spadvisors.com

Greg comes to Strategic Philanthropy Advisors after 18 years at JPMorgan Chase and its predecessors. He was the program director for all community development grants and served as the Secretary of the J.P. Morgan Chase Foundation. Supervising a 5-member team of grants officers, he managed the annual distribution of \$16 million in grants and recoverable grants. He worked closely with over 300 nonprofit organizations each year, evaluating their efficiency and effectiveness, in order to recommend funding decisions. He designed and managed numerous philanthropic initiatives which addressed emerging issues in the nonprofit sector. He is especially knowledgeable about the broad range of community economic development issues. These include affordable housing development and management, employment training and micro-enterprise creation, increasing affordable child care options and human service delivery systems. He is experienced in organizational capacity building, strategic planning and program implementation, evaluation and resource development. Greg represented JPMorgan Chase through numerous negotiations with government, civic and community leaders on a wide range of issues aimed at aligning the firm's services with its clients' priorities. He regularly made presentations on nonprofit management issues to nonprofit leaders, foundation executives and senior bank officers.

Before joining JPMorgan Chase, Greg was Director of Operations for the City Volunteer Corp. in New York City, the nation's first urban national service program for young adults, and Director of Court Operations for the Victim Services Agency (now Safe Horizons). Previously, he held several positions, with increasing responsibilities, in the areas of training, educational evaluation, criminal justice planning and crisis intervention.

He has served on the boards of Common Cents New York, the Forum of Regional Associations of Grantmakers, the Nonprofit Coordinating Committee of New York, and the New York Regional Association of Grantmakers, for which he served as Chair of the Board from 1999 through 2001. Additionally, he has served on the National Advisory Boards of New Ventures in Philanthropy and the Association for Enterprise Opportunity.

Greg received a Bachelor of Arts degree in Psychology from Yale University. He also earned mid-career accreditation in the areas of financial management, commercial lending and conflict resolution.

Barbara Krasne
Managing Director, KrasnePlows

Prior to co-founding KrasnePlows, Barbara Krasne established BK Services Group, LLC, a management consulting firm for nonprofit organizations and privately-held companies. Earlier in her career, Krasne held leadership positions in the advertising, media, education and art worlds, at USA Today International, Publicitas and Artnet.com among others. She has built businesses from the ground up and successfully rescued troubled companies.

A former CEO, Krasne is experienced in all aspects of an enterprise, from marketing and sales to finance and operations, and has provided strategic and operational expertise to both for-

profit and nonprofit organizations for over 25 years. She understands technology and has consistently used it to build successful businesses.

In 2002, Krasne co-founded the Downtown Business Network, a business development membership organization for business services firms in lower Manhattan. There she developed and executed the operational plan for advisory board, membership, funding and corporate sponsorship programs.

Krasne serves on a number of corporate and nonprofit boards, frequently as an officer and member of the executive committee. These include Christopher Norman Chocolates, Governance Matters, and Inwood House, and historically, the Parent-Child Home Program and Body Positive, a community-based AIDS organization. She has been appointed to the University of Kansas Marketing Alumni Advisory Council. Krasne was a mentor for the National Social Venture Competition, sponsored by Columbia Business School, the Haas School of Business at University of California at Berkeley, and The Goldman Sachs Foundation, among other professional affiliations.

Krasne, who is a long time resident of New York City, earned a BA in Art History and Psychology from the University of Kansas. She received an MBA in Finance and Accounting from the same institution.

Peter Levinson

President and Creative Director, LevinsonBlock LLC

As Principal and Creative Director, Peter brings over 25 years of design and project management experience to LevinsonBlock LLC.

LevinsonBlock LLC is a marketing and design firm that has specialized in partnering with non profits, healthcare and service businesses for over 25 years. Peter's approach is pragmatic -- he helps clients connect with their target audience and make money.

At LevinsonBlock, Peter has worked with clients such as Alliance for Lupus Research, The Public Library of Science, Brooklyn Youth Chorus Academy, JobsFirst NYC, and Fedcap Inc.

LevinsonBlock builds usable websites; develops brand strategies and brands; creates persuasive content; and designs print (such as annual reports, gala promotion, periodicals, and brochures).

The work has been honored by professional organizations including publication in the Logo Lounge II Annual; inclusion in the Print Regional Design Annual; publication in Print's Best Logos and Symbols 3; and an Award of Merit from Zanders Paper Design Competition.

Peter founded LevinsonBlock in 1984, after 4 years as Creative Director at Julie Finger Design Office in Los Angeles.

Peter is a former board member of the American Institute of Graphic Arts (AIGA) Mentoring Program in partnership with the High School of Art and Design. He is proud of seeing the 2 mentees he worked with for over 6 years go on to success in college.

James Lisher

Former Chairman and Managing Director, Lisher & Company, Inc.

Nonprofit

As a social entrepreneur in 1998, Jim brought the nationally known STRIVE job training program for low income workers to Connecticut, opening in Norwalk. There are now three full time sites in the state with over 2,000 graduates. He served as Chairman/ CEO of STRIVE Fairfield County until merging with Career Resources, Inc in 2003. He is currently Board Chairman of Career Resources, Inc. a \$4million regional workforce development resource.

Jim's other current non-profit activities include: Chairman, Health & Human Services Commission of New Canaan, Connecticut; Board of National Foundation for Teaching Entrepreneurship (NFTE) of Fairfield & Westchester Counties; and the Regional WIRED Board of the US Department of Labor for workforce development in the tri-state area.

Corporate

Most recently in 2005, Jim co-founded Wharton Innovative Products, LLC- a manufacturer of **ON THE JOB®** branded, patented technology based skin care products for tradesmen.

Until retiring in 1998, he was for 31 years the Chairman/CEO of Lisher & Company, Inc. where he led innovation strategy planning, new product development and venture management assignments in over 70 Fortune 1,000 companies from AT&T to Hallmark toVelcro. He also has been an active entrepreneur as Chairman/ CEO of Waldow Copperware in Brooklyn and Chairman of Medical Problem Knowledge Coupler Company in Burlington, Vermont. His early career was in marketing management with Procter & Gamble and RJR/Nabisco.

He has served on numerous corporate and non-profit boards, having been elected Chairman of ten boards.

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Lou Miceli

Executive Director, The Workforce Professionals Training Institute

Lou Miceli founded the Workforce Professionals Training Institute in December of 2003. The organization – the first of its kind in the country – trains front line, managerial, and senior staff in the workforce development field, focusing on curriculum and activities that improve organizational capacity and performance. Since WPTI's inception, 5000+ people have been trained through fifty different training programs. Within its first five years, the organization has grown to a multi-service training organization with a \$1 million+ annual budget employing a team of seven staff and several consultants.

Lou's career has been at the nexus of adult education, workforce development, capacity building, and program management. Early in his career, he was an employment readiness trainer, a vocational counselor, and a job developer, and managed several employment

THE CENTER FOR NONPROFIT STRATEGY AND MANAGEMENT

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programs for youth and adults.

As a trainer for practitioners, Lou has provided front line, managerial, and executive staff within the public, private, and non-profit sectors. In the non-profit sector, he has trained substance abuse counselors, adult educators, public school teachers, workforce development staff, and front-line family workers. Through WPTI, he has trained staff across the public sector in New York City, including: The New York State Department of Labor, the New York City Department of Small Business Services, the New York City Housing Authority, the New York City Department of Human Resources Administration, and the New York City Department of Parks and Recreation.

Through WPTI, Lou has also created training programs, leadership institutes, and change management programs. As a consultant and adjunct, he has taught public interest and human service courses at the City University of New York and Marymount Manhattan College, and has developed college access curriculum for public high schools.

In the private sector, Lou has trained human resource professionals, account and sales executives, and senior executive staff concerning a variety of leadership development, employment law, and performance management topics. This work has included the financial sector, the health care sector and the education sector.

WPTI also works closely with philanthropy, partnering with foundations to provide customized training initiatives designed to support organizational performance and to build overall capacity of programs funded through performance-based grants and contracts. Lou's work has focused on multi-sector partnerships in order to build the reputation and reach of the workforce development field.

Lou presently serves on the Board of Directors for Opportunities for a Better Tomorrow and Youth Represent – both organizations serving young people in New York City, and serves on advisory boards locally and nationally that are concerned with youth, education, and employment issues.

Lou acquired a Bachelor of Arts degree from the University of Connecticut, a Master of Social Work degree for the Silver School of Social Work at New York University, and a Master of Science in Management degree from the Wagner School of Public Service at New York University.

Farra Trompeter
VP, Client Relationships + Strategy, Big Duck

Farra Trompeter is Vice President of Client Relationships + Strategy at Big Duck. Big Duck combines expert strategy with award-winning creative to help nonprofit organizations transform the way they communicate. Farra's expertise focuses on helping nonprofits use the Internet (email, websites, social media, etc.) to increase an organization's visibility and connect with donors and activists. Before Big Duck, Farra honed her skills at Donordigital and Douglas Gould and Company, developing direct response fundraising, advocacy and marketing strategies and producing user-driven websites. She has worked closely with American Lung Association, US Fund for UNICEF, Women's Sports Foundation, Parent Project Muscular

Dystrophy, and United Way of New York City, and other nonprofits. Farra holds an M.S. degree in nonprofit management from The New School and currently serves on the board of the New York City Anti-Violence Project.

Connie Zalk
Independent Consultant

Connie Zalk earned a baccalaureate degree in education from the University of Wisconsin, Madison, and later a master's degree in public administration from Bernard M. Baruch College, City University of New York.

She began her career in 1971 as an elementary school teacher in the New York City public school system, and was laid off in 1976 during New York City's fiscal crisis. Ms. Zalk became fully engaged in the study and practice of public administration resulting from her graduate studies at Baruch and her new, post-teaching career, serving as associate director for the National Center for Public Productivity at CUNY from 1976 until 1979.

Ms. Zalk moved to the Mayor's Office of Operations in 1979, where she first served as an agency operations analyst for the New York City Board of Education and CUNY and then as the first director of administration, budgeting and personnel for that office, the performance measurement and review arm of city government. She capped her career in municipal government by serving as deputy commissioner of the city Department of Personnel's Bureau of Personnel Development. There she was in charge of planning, organizing, and coordinating all training programs for more than a quarter-million city workers.

In 1988 Ms. Zalk left government for the private sector and served as director of human resources and administration for Adams and Rinehart, Inc., an international financial and corporate public relations firm.

From 1993 until 1998 Ms. Zalk served as director of human resources at the 92nd Street Y in New York City. There, she directed all human resource functions for one of the largest not-for-profit community service and cultural arts organization in the United States.

In 1998 Connie joined the College Board to head the Human Resources Department as executive director of human resources and was promoted to vice president of human resources in 1999. In that role she took on assignments in strategic planning, development of employment policies, salary and benefits, employee relations, recruitment, staff training and, most recently, with a staff complement of more than 1,100 people in 15 locations and revenues of \$650 million, she launched a major project to transform the human resource function from a transactional model to a strategic business services model. Ms. Zalk retired from full-time work at the College Board at the end of 2007 and continues, part-time, as Special Advisor to the President.

Connie is currently focusing on assisting small non-profits, traditionally years behind larger organizations, in developing strategic human resource capabilities through the use of operational plans and metrics to ensure that people management practices are integrated fully into the strategies, goals and mission of those organizations. Her current consulting practice includes the following areas of expertise:

Policy Design and Administration
HRIS
Harassment/EEO Compliance
Attendance and Leaves
Training and Development
Leadership and Coaching
Position Classification
HR Metrics and Analysis

Compensation and Benefits
Recruitment
Downsizing/RIF/Terminations
Labor Relations
Conflict Resolution
Performance Management
Risk Management

Gary Bagley
Executive Director, New York Cares

Gary Bagley serves as Executive Director of New York Cares. Before being appointed to his current post, he served as Associate Executive Director since July 2008. Bagley joined New York Cares in 2004 as Senior Director of Programs. Prior to New York Cares, Gary was the Program Director for Young Audiences New York. From 1992 to 2000, he was a teaching artist and then the Director of Education for TADA! Youth Theater.

Gary has served as the Secretary of the Board of Directors of the New York City Arts in Education Roundtable and as the Chair of its Publications Committee and as a panelist for the New York State Council on the Arts (Arts in Education), New York Foundation for the Arts, and Center for Arts Education (Annenberg Challenge). He has a B.S. in music composition and acting from Ithaca College and an M.P.A. from Baruch College of The City University of New York, where he is now an Adjunct Lecturer.

Joan Straussman Brandon
Private Consultant

Joan Straussman Brandon had been with NeighborWorks America for twenty-five years before becoming a consultant in 2006. During those 25 years, Joan spent seven with Field Operations and eighteen with the Organizational Assessment Division. In Field Operations Joan was responsible for the development and/or expansion of several NeighborWorks organizations. She also provided technical assistance to organizations as well as training at various institutes and partnership events. For three years she worked exclusively on developing mutual housing associations. In the organizational assessment division, Joan managed organizational assessments of some of the network's more complex organizations, and was involved in the development of the PROMPT review system. She also developed review tools for organizations involved with property ownership and management and worked closely with the Community Building and Organizing Initiative to develop tools based on the PROMPT model to assess community building and organizing activities. Joan was also responsible for more than sixty of the chartering reviews for new network affiliates. Mentoring of new staff and consultants was also one of Joan's major responsibilities. Since becoming a consultant, Joan has continued to do organizational assessments, coaching of staff, Board development, and training course development and training.

Prior to NeighborWorks America, Joan was Executive Director of a multi-service organization in Chelsea, Massachusetts. She was instrumental in developing services and programs for Chelsea's growing Latino community. She is fluent in Spanish. In her early professional years, Joan worked for organizations providing counseling to substance abusers.

Joan has a Bachelor's Degree from Clark University and a Masters Degree in Social Work with a concentration in Planning and Community Organizing from Boston College. She has taken a multitude of courses on every aspect of community development at Harvard Extension School, NYU, and NeighborWorks® Institutes.

Susan Chambré
Professor of Sociology, Baruch College

Susan M. Chambré, a Professor of Sociology at Baruch College, City University of New York, holds a Ph.D. in Sociology from the University of Pennsylvania. Her publishing, teaching and pro bono consulting about volunteerism and nonprofit organizations date back nearly three decades.

She has published three books, *Good Deeds in Old Age: Volunteering by the New Leisure Class* (1987), *Fighting for Our Lives: New York's AIDS Community and the Politics of Disease* (2006) and *Patients, Consumers and Civil Society*. Her articles and book reviews on nonprofit organizations, AIDS policy, and volunteerism have appeared in *Nonprofit and Voluntary Sector Quarterly*, *Nonprofit Management and Leadership*, *the Journal of Volunteer Administration*, *Voluntary Action Leadership*, *Social Service Review*, *Policy Studies Journal*, *Health Affairs* and the *Gerontologist*.

Suzanne Craig
Program Manager – New York, Taproot Foundation

Suzanne Craig joins the Taproot Foundation with over 15 years of business experience. She has developed marketing and project management expertise through her 6 years at Viacom and Nickelodeon. Here her responsibilities ranged from managing volunteer events through overseeing the Work, Family & Life Balance department through strategic brand development as the Brand Manager for Blue's Clues and Dora the Explorer. Her marketing experience also includes the establishment and development of a marketing department for a \$14M manufacturing company. Suzanne holds a bachelor's degree in Psychology from Fairfield University and an MBA in Marketing from Fordham University.

Joe Cruickshank
Former Director, Baruch College School of Public Affairs Nonprofit Group

Joe Cruickshank spent his work career in the non profit sector with Church World Service, The Halsted School, American Farm School, Recording for the Blind and The Clark Foundation. In addition, he started a consulting business, and taught in the Graduate School of Public Affairs at Baruch College. In retirement he has volunteered for Ch. 13, the New York Philharmonic, the Chautauqua Institute and the Leviticus Fund. With his wife Nancy he spent a year traveling the border of the United States, and is currently planning a similar venture in 2009 to discover even more about this beautiful and interesting country.

Kandace Evelyn
Program Manager – Washington, DC, Taproot Foundation

Kandace brings 8 years of advertising, marketing, project management and public relations to the Taproot Foundation. Prior to joining the Taproot Foundation, Kandace worked as a Client Director with J. Walter Thompson advertising agency in both the St. Louis and New York markets. She worked with a wide variety of clients in the retail, financial services and technology industries. Her duties included project management, media planning and brand management.

Prior to JWT, Kandace worked with Fleishman-Hillard STL and as a Program Manager for tutorial services geared to inner-city students in the St. Louis Public School system. Her nonprofit experience includes brand development for the Boys & Girls Club of America and the creation of a program with the YWCA – Women to Work – which assisted drug rehabilitated individuals reenter the workforce with confidence. Kandace has a BA from Hampton University.

Michael Feller

Principal, Strategic Philanthropy Advisors, LLC

Email: michael@spadvisors.com

During a twenty-one year career at JP Morgan Chase and its predecessors, Michael served as President of the J.P. Morgan Chase Foundation and Senior Vice President of Corporate Social Responsibility, providing philanthropic and technical support to nonprofit organizations worldwide in Community Economic Development; Precollegiate Public Education; Arts and Culture. JPMorgan Chase was the leading financial services industry global philanthropy program, reaching a high of \$104 million in 2002 with a staff of 25. He also managed employee volunteer programs and matching gifts. Under his leadership, Global Days of Service, an annual volunteer program, grew to 25,000 participants working on more than 1,300 projects in 300 cities around the world. Prior to this, he was Senior Vice President for Community Relations covering New York, New Jersey and Connecticut.

Before joining the firm, Michael worked for eleven years in inner city schools in New Rochelle and New York City, most of that time in East Harlem. He developed and implemented an interdisciplinary curriculum as the director of a new, alternative junior high school, the School of Communication and Health. Later, as the Director of Program Development and Evaluation in the District's Office of Funded Programs, he supervised research and development for new programs and funding sources in alternative schools, arts in education, computer education and consumer education.

Michael's nonprofit board or advisory board service includes the Washingtonville Housing Alliance, Regional Partnership of Schools & Colleges at Purchase College, Dress for Success Worldwide and the Welfare-to-Work Partnership. He has been active with the Council on Foundations Committee on Corporate Grantmaking, as well as the Contributions Council of the Conference Board, and he served on the Editorial Advisory Board of the Committee to Encourage Corporate Philanthropy. His article on World Trade Center grants, "Minding the Gaps," was published in Foundation News & Commentary (September/October 2002).

Michael has received numerous awards, including the Inroads New York "Business Advisor of the Year" (1994), the Chase Manhattan Bank "Diversity Champion Award" (2000) and the Westchester American Jewish Committee "Institute of Human Relations Award" (1998).

Michael is a graduate of Pomona College (B.A. in Psychology); Teachers College, Columbia University (M.A. in Curriculum, Ed.D. in Communication); and the Columbia Graduate School of Business (M.B.A. in Finance). He currently teaches as an associate professor in the School of Public Affairs at Baruch College, City University of New York.

Bill Ferns**Associate Professor, Zicklin School of Business**

Bill Ferns, Ph.D., was the founder and coordinator for the Workshop for Advanced Information Systems in the Human Services (WAISHS) at Baruch, from 1993 to 1998. The majority of his research and development efforts have been in the use of information technology in the human services sector, and he has articles published on the use of expert systems in the social services. These articles have appeared in *Expert Systems with Applications*, *AI & Society*, *Journal of Technology in Human Services*, and *Applied Artificial Intelligence*, and as a chapter in *Practitioner-Researcher Partnerships: Building Knowledge from, in, and for Practice*, from NASW press. More recently, he has been working in the area of corporate social responsibility.

As a software developer, Bill has written software systems for the New York State Psychiatric Institute of Columbia-Presbyterian Hospital, the Neuropsychiatric Institute of UCLA, the National Development and Research Institutes (NDRI) and the Family Research Center, New York City. He has consulted with the New York State Education Board and the State of Indiana evaluating higher education technology programs. He also chaired the Advisory Committee of *Teaming with Technology*, a joint venture of AmeriCorps, United Way, and IBM that provided VISTA volunteers to social service agencies in New York City. He continues to provide training and consulting on IT management to non-profit organizations.

Bill is an Associate Professor of Computer Information Systems in the Zicklin School of Business at Baruch College, CUNY, currently teaching in the areas of accounting information systems and database design and implementation. Bill was the founding coordinator for Baruch's Full-Time MBA program. In this role, he designed and developed Baruch's first 'smart classrooms', utilizing a teacher's station equipped with a computer, audio, video, and full projection, and Internet connections at every student's seat. That design has been replicated throughout Baruch's new Vertical Campus.

Bill earned his MS in Business Computer Information Systems at Baruch, and his Ph.D. in Computer Science at the Graduate Center of the City University of New York.

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Hank Goldstein**President and Chief Executive Officer, The Oram Group, Inc.**

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Henry (Hank) Goldstein is president and chief executive officer of The Oram Group, Inc., (www.oramgroup.com) consultants to philanthropic organizations, with offices in New York and

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San Francisco. HG is past chair of *Giving USA Foundation*, and former chairman and president of the Association of Fundraising Professionals (AFP) nationally and in New York. His current and recent clients include American Craft Council, American India Foundation, Lingnan Foundation, The Cooper Union, Children's Health Fund, amfAR, Stamford Health Foundation, Fred Hutchinson Cancer Research Foundation, Planned Parenthood Los Angeles, CRUDEM Foundation/Knights of Malta Association, St. Francis College, Human Rights Campaign, Prostate Cancer Foundation, Family Health International, Africa-America Institute, H. Lee Moffitt Cancer Center, Lesbian Gay Bi-Sexual & Transgendered Community Center, New Jersey Institute for Social Justice, Friends of the High Line and New York Urban League.

HG is president of the board of trustees of Women's Prison Association, a trustee of PICO National Network, treasurer of Jazzmobile and trustee emeritus of Berkshire Theater Festival. He is co-author of *Dear Friend, Mastering the Art of Direct Mail Fundraising* and *So You Want to be a Consultant!* Opinion and commentary on current philanthropic trends may be found on the blog *Oram Matters*, accessed directly on line or through the company's web site. HG is adjunct professor of philanthropic management at Milano [The New School for Management and Urban Policy](#) 250 studies of nonprofit organizations by his graduate students over 20 years of teaching.

Emily Guthman

Associate Director – New York Program, Nonprofit Finance Fund (NFF)

Emily Guthman is the Associate Director, New York Program at Nonprofit Finance Fund, where she manages the program's many initiatives and funding relationships. In addition, Ms. Guthman is actively involved in the marketing of NFF's services to new funders and partners in the New York City market and is responsible for the growth and development of NFF's financial and advisory services businesses. Prior to joining NFF, Ms. Guthman worked at Local Initiatives Support Corporation (LISC) where she managed LISC's federal funding operations and was responsible for spearheading LISC's first-ever government development effort. Ms. Guthman has also worked on community development issues at the Fannie Mae Foundation, as well as in local government with the Los Angeles County Board of Supervisors. Ms. Guthman holds a Master of Public Policy in Community Development and Nonprofit Management from the University of Southern California and a BA in Religion and Political Science from Emory University.

Megan Heister

Independent Consultant

Email: megan.heister@alumni.carleton.edu

Megan Heister is a development professional, with over five years of experience in the field of Prospect Research and Management. Prior to relocating to New York, Ms. Heister worked at Massachusetts General Hospital (MGH) where she was responsible for all aspects of the prospect research and management function of the MGH Cancer Center's multi-million dollar campaign, the backbone of an overall five-year, billion dollar plus, hospital-wide campaign. Ms. Heister has also worked at Tufts University where she worked closely with the School of Medicine, College of Arts, Sciences and Engineering and the Gerald J. and Dorothy R. Friedman School of Nutrition Science & Policy. In addition to her regular job responsibilities at both MGH

and Tufts, Ms. Heister was actively involved in the implementations of new fundraising databases.

Thomas Kamber
Executive Director, OATS

Thomas Kamber is the founding executive director of Older Adults Technology Services (OATS), where he has led the creation of the largest municipal technology program for senior citizens in the country—training more than 4000 senior citizens at over 30 locations since 2004 and leveraging over a million dollars in public and private financing. His work at OATS has been covered by *The New York Times*, *NBC Channel 4 News*, *The New York Daily News*, *Fox 5 News*, and *NY1*, and is featured in *Generation Blend: Managing Across the Digital Age Gap*. Prior to launching OATS, Dr. Kamber held senior management positions at nonprofit housing and technology organizations, as well as political campaigns at the local, state, and national level. He is a co-founder and board member of the nonprofit Afro-Latin Jazz Alliance, is a board member of the Park Slope Geriatric Center, and is co-chair of the Housing and Human Services Committee for Brooklyn Community Board Six. In the private sector, he served as a senior brand strategist for D’Arcy advertising, where he helped design and implement communications strategy for Cap Gemini Ernst & Young, a leading global technology services corporation. Dr. Kamber teaches undergraduate and graduate courses on social entrepreneurship and advocacy at Columbia University and the New School University, and has published widely on public policy topics. He has a B.A. from Columbia College and a Ph.D. from the City University of New York.

Corrine Z. Kohlmeyer-Hyman
Principal, KH Partners

An accomplished marketing and design professional, Corrine co-founded KH Partners in 2005. She has helped dozens of companies, educational institutions and nonprofit organizations develop their brands, position and market their products, services and programs, and promote their fundraising and events in both print and web. Prior to founding KH Partners, Corrine served for eight years as the Art Director at two of NYC’s leading universities, Rockefeller University and the School of Public Affairs at Baruch College/CUNY. She has her Masters in Graphic Design from Pratt Institute in Brooklyn.

Michael S. Kohlmeyer-Hyman
Principal, KH Partners

Michael has been a trusted advisor to start-up, mature and distressed companies and nonprofits for over twenty-five years.

Prior to founding KH Partners, Michael served as Senior Vice President and General Counsel (1998-2003) for Fundtech Ltd. (Nasdaq: FNDD and TASE), a publicly traded global provider of financial software solutions for major financial institutions. He headed Fundtech’s Acquisitions and served on its Strategic Planning Committees.

Before going in-house, Michael worked for such major U.S. and foreign law firms as Wilson Sonsini Goodrich & Rosati in Palo Alto, CA, Leshem-Brandwein & Co. (currently Meitar Liquornik Geva & Leshem Brandwein) in Ramat Gan and Dankner-Lusky & Co. in Tel Aviv.

Both Corrine and Michael sit on boards of nonprofits while actively working on their communications and budget committees.

Tony Knerr

Managing Director, Anthony Knerr and Associates

Anthony Knerr is Managing Director of Anthony Knerr & Associates (www.agnerr.com). Founded in 1990, the firm assists leading nonprofit institutions in the United States and Europe successfully solve complex strategic issues. Clients served by the firm include Barnard College, Baruch College, Case Western Reserve University, Columbia University, Cooper Union, Educational Testing Service, Ford Foundation, French-American Foundation, INSEAD, Massachusetts Institute of Technology, New York University, Oxford University, Pace University, Princeton University, Queens College, Radcliffe College, Salzburg Festival, Smithsonian Institution, World Bank and Yale University.

Tony earlier was Executive Vice President for Finance and Treasurer of Columbia University and Vice Chancellor for Budget and Planning of the City University of New York. He was previously Special Assistant for Budget and Planning to the Acting President of Yale University and an Associate with the consulting firm of Booz, Allen & Hamilton.

Tony is President Emeritus of the Caribbean Conservation Corporation; President Emeritus of United Neighborhood Houses of New York City; Vice Chairman of Humanity in Action; Treasurer of Words Without Borders; and a board member of the Keats-Shelley Association and the New York Society Library. He is also a Director of the Delaware Group of Mutual Funds and a member of the Mutual Fund Directors Education Council.

He received his Ph.D. in English Literature from New York University; M.A. *cum laude* in English Literature from Yale University; and B.A. *magna cum laude* in Mathematics and Philosophy from Yale University.

Sandra A. Lamb

President and CEO, Lamb Advisors LLC

Sandra A. Lamb, President and CEO of Lamb Advisors, has over 35 years of Wall Street, corporate and nonprofit experience addressing financially complex and critical strategic issues. Prior to establishing Lamb Advisors, Sandy's corporate experience included 20 years at the investment bank, Lazard Frères & Co. LLC, where, as a managing director, she held executive responsibility working with clients on all aspects of buying and selling businesses and other financial advisory assignments. Prior to joining Lazard in 1983, Sandy spent 16 years as a portfolio manager with The MONY Group.

Sandy's nonprofit experience includes serving as Chair of the New York Women's Foundation in 2001-2002. As Chair, she provided critical leadership in responsible financial management, strategic planning, development and governance initiatives for a diverse, hands-on Board of 36 members and a committee structure of over 130 volunteers. Through the Foundation's grantmaking process, Sandy gained expertise in grassroots organizations and philanthropy. In

2005, Sandy served as Interim Executive Director of the Foundation and as a member of the Search Committee for the new CEO.

Sandy has also served on several nonprofit and for-profit Boards, including ORC Worldwide, Biomet, Inc., The Fortress Group, Inc., Center Trust, Inc. the Pittsburgh Theological Seminary, the Nonprofit Coordinating Committee of New York, and the Taproot Foundation. She served as Chair of the \$36 million Crossroads Capital Campaign for the Fifth Avenue Presbyterian Church. She is currently Vice Chair of the Pittsburgh Theological Seminary, Chair of the Audit Committee for the Nonprofit Coordinating Committee of New York and Treasurer of the Taproot Foundation.

As a businesswoman and as a nonprofit executive, Sandy understands the increasingly complex environment in which the nonprofit community operates and how to address this environment with strategic solutions.

Sandy has an MBA in Finance from New York University Graduate School of Business where she was a member of the Business School Scholastic honor society, Beta Gamma Sigma. She graduated with a BA in Political Science from Duke University and was elected to Phi Beta Kappa.

David Lebenstein

Principal & Senior Managing Director, Not-for-Profit Division, Colliers ABR

In over 22 years of commercial real estate experience Mr. Lebenstein has overseen the acquisition and disposition of more than \$1 billion in properties (including office buildings, shopping centers, apartment complexes, and industrial properties) in 17 states totaling more than 9 million sf. Working with his long standing partner, the late Arlene Wysong, Mr. Lebenstein has closed more than 200 transactions on behalf of not-for-profit clients. Mr. Lebenstein joined Colliers ABR in fall 2005 as Senior Managing Director and Director of the Not-for-Profit Practice. He also heads up Colliers National Specialty Practice Group for non-profits.

Mr. Lebenstein's notable projects and achievements include:

- ◆ Medical Health Research Association (69,000 sf) – An expansion of their existing space, which included landlord financing of tenant improvements. Instrumental in helping the client change its corporate identity and culture through a consolidated workplace.
- ◆ Enterprise (20,000 sf) – A transaction which included an upgraded headquarters space by relocating to lower Manhattan.
- ◆ Spence-Chapin (20,000 sf) – Purchase of commercial condominium for new headquarters. Initially, identified 18 potential relocation sites, advising decision makers on lease versus purchase options, and additionally assisted in helping secure tax-exempt bond financing.
- ◆ Developed first successful commercial condo for nonprofit organizations at 666 Broadway
- ◆ Senior Man of the Year, 2001 – Young Men's/Young Women's Real Estate Association
- ◆ Nominated for the Real Estate Board of New York's "Most Ingenious Deal of the Year"
- ◆ Board of Directors – City Futures, Inc., Nonprofit Finance Fund, Citizen Budget Commission

Joel Levy

Co-Chief Executive Officer, YAI/National Institute for People with Disabilities

For nearly four decades, Dr. Joel M. Levy has served as a national leader in the field of intellectual and developmental disabilities. As the Chief Executive Officer of YAI/National Institute for People with Disabilities, Dr. Levy oversees a network of seven agencies whose 5,500 staff members serve more than 20,000 individuals with developmental disabilities in more than 450 community-based programs. Since assuming the leadership of YAI/NIPD, Dr. Levy has promoted social equity for people with disabilities and their families, and added immeasurably to their quality of life through the development of a wide range of diverse programs in service delivery, many of which now serve as national models.

Dr. Levy has published over 30 articles or chapters in books on topics including employment, employers' attitudes, respite, the prevention of family stress, health care, and AIDS prevention in professional journals such as the *International Journal of Rehabilitation Research*, the *Journal of Rehabilitation*, and the *Journal of Sexuality and Disability*. He also serves on the editorial board of several professional publications.

Dr. Levy has held several academic appointments in major educational institutions, including the University of Pennsylvania, Baruch College, Adelphi University, the John F. Kennedy Jr. Institute for New Worker Education at the City University of New York, New York University, Mount Sinai School of Medicine, and the University of Haifa in Israel.

Nationally recognized as a champion of the rights of people with developmental disabilities, Dr. Levy has been the recipient of numerous professional awards, including the Gloria Hobson Nordin Social Equity Award from the American Society for Public Administration, the Exemplar Award for the National Network for Social Work Managers, the Community Service Award from the American Public Health Association, the Distinguished Achievement Service Award from the International Association for the Scientific Study of Intellectual Disabilities, the Image Award and the Knee/Wittman Health and Mental Health Award from the National Association of Social Workers, the Excellence in Leadership Award from the Council for Exceptional Children and the W.F. Faulkes Award from the National Rehabilitation Association. Most recently he was acknowledged by the American Society for Public Administrators for his role in creating social equity and received the Ernst & Young Entrepreneur of the Year 2007 award.

Dr. Levy has served on various national professional boards and has developed creative programs including being a moderator on a TV series to help change public and professional perceptions regarding the rights and abilities of people with developmental disabilities.

Dr. Levy has a Doctorate in Social Work (D.S.W.), as well as a M.S.W. from Adelphi University. He received his B.S. degree in Education as well as an M.A. degree in Psychology from New York University.

Kathy Murnion

President, K.W. Murnion & Associates, Inc.

Kathleen Murnion is president of K.W. Murnion and Associates, Inc., a management consultant firm to nonprofit organizations, specializing in strategic planning, board development and market

planning. Prior to becoming a consultant, her corporate career was as a marketing manager at the Life Savers Division of Nabisco Brands, Inc. and the Clairol Division of Bristol Myers. More recently, Ms. Murnion was Adjunct Professor of Marketing at New York University and Fordham University. She has served on several boards, including: Leviticus Alternative Fund (current President), National Pastoral Life Center, Mary Manning Walsh Home, Dominican Academy (Vice President) and the American Marketing Association's Not-for-Profit Council (President). Ms. Murnion holds an MBA in Marketing and Management from NYU, as well as an MA (CUNY) and a BA (Mercy College) in Literature.

Russell Pomeranz

Manager of Financial Advisory Services, Fiscal Management Associates (FMA)

Russell Pomeranz, MBA, is Manager of Financial Advisory Services at FMA. Russ provides consulting support to nonprofit executives in financial management areas such as budgeting and financial analysis. His support enables leaders to improve their organizations' financial health by understanding the true costs of their programs, enabling them to plan effectively for the resources necessary to carry out their missions.

Russ comes to FMA with over 20 years of nonprofit financial management experience, most recently as Chief Operating Officer/Chief Financial Officer and Treasurer of the Vera Institute for Justice. Prior to that he was the Director of Finance at the Council on Foreign Relations, CFO at Spence-Chapin Services to Families and Children, and worked in a senior financial and administrative capacity at several arts organizations including the International Center of Photography and Meet the Composer. He serves on the Boards of Directors of the nonprofit organizations Job Path and MATA (Music at the Anthology), and is President of the Columbia County Historical Society. He is currently an adjunct professor at the Columbia School for Public Health

Russ has published articles on the non-profit sector in publications including the New York Times, the Chronicle of Philanthropy, and The Register Star. He holds an MBA from the University of Michigan, and a BA in Economics from Haverford College.

Bob Rosenbloom, Ph.D.

Co-founder and Principal, Strategic Philanthropy Advisors, LLC

Bob Rosenbloom's consulting practice concentrates on assisting clients plan, develop and implement strategies for effective international and domestic philanthropy, especially philanthropy targeted to increasing the income and assets of low-income communities and families. He also brings long-time experience to the fields of social investing and corporate social responsibility. Recently, he has expanded his practice to include assisting nonprofits with strategic planning, program development and fundraising.

Bob has substantial experience in the philanthropic field, most recently as a consultant, and before that at JPMorgan Chase Bank and its predecessors (Chemical and Chase banks). Throughout his career, he has focused on community development, helping to nurture and grow public/private/nonprofit partnerships that assist low- and moderate-income people and communities. In the course of his work he has designed and administered both domestic and

international philanthropic programs and has come to know many of the foundation and government programs that nonprofits rely on to underwrite their projects and programs. As an outgrowth of that work, he developed close relationships with business, government and nonprofit leaders in the community development field. He has also worked closely with philanthropic colleagues at other corporations and foundations.

In 2006, four former colleagues from JPMorgan Chase Foundation and Bob established a consulting firm, Strategic Philanthropy Advisors (www.SPAdvisors.com) to assist individuals, families, small foundations and corporations identify and achieve their philanthropic goals. The firm also works with nonprofits to assist them with fundraising, strategic planning and program development. One of Bob's current clients is a hedge fund that engaged him to develop and administer a giving program to nonprofits involved with economic development and primary education in emerging market countries. For the last several years, he has also been assisting a large New York City-based housing organization raise general operating grants as well as capital funds for a new community center in a formerly devastated neighborhood in the South Bronx.

Bob's career spans more than twenty years in Corporate Social Responsibility and Philanthropy at JPMorgan Chase Bank and its predecessors, and more than nine years as a Professor of Political Science and Urban Studies at Mount Holyoke College. At JPMorgan Chase he was responsible for the bank's international philanthropy programs totaling \$6 million annually as well as for \$3 million in grants annually to national community development organizations. In the international field he focused on microfinance, low-income housing, efforts to combine technology and education, and international human rights. In the national community development field he worked closely with nonprofit intermediaries to underwrite the development and dissemination of capacity-building and technical assistance programs and financial tools for locally-based community development. Earlier, Bob headed up the bank's community development philanthropy in the Tri-State Region of New York, New Jersey and Connecticut. With a staff of three professionals he managed a \$7 million zero-interest loan program and over a half dozen grant programs and initiatives that together provided more than \$15 million per year to local nonprofits involved in low- and moderate-income housing, workforce development, child care, financial education for adults and youth, and after-school education.

Prior to his bank career, Bob was Associate Professor of Politics at Mount Holyoke College and Chair of its Urban Studies Program. Following his move to the bank he continued to teach as an adjunct professor at New York University Law School and Pace University School of Business. Bob has a Ph.D. in Political Science from Stanford University and an A.B. from Princeton University, where he was in the Woodrow Wilson School of Public and International Affairs. Before entering graduate school, he was a Peace Corps Volunteer in Bolivia where he began his career in community development by organizing marketing cooperatives among fruit growers. As a result of his two years in Bolivia and subsequent practice, Bob is fluent in conversational Spanish.

Sarah E. Ryan

Assistant Professor of Communication, School of Public Affairs, Baruch College

Sarah E. Ryan, Ph.D., former Director of the Bronx Defenders Debate Initiative, is a member of the Communication faculty in the School of Public Affairs at Baruch College, The City University of New York. Dr. Ryan specializes in mission-driven marketing and communication. Her clients

include the New York City Housing Authority, the New York Lawyers in the Public Interest, and the New York City Leadership Academy (for aspiring principals). Dr. Ryan is one of the foremost teachers of argumentation in the world. She has taught debate at four U.S. colleges, fifteen New York City high schools, a men's maximum security prison (Graterford, PA), Gymnasium #3 in Mogiliev, Belarus, and the World Debate Institute in Burlington, VT. Dr. Ryan holds a Ph.D. in Rhetorical Criticism, a Graduate Certificate in Women's Studies, and an M.A. in Interpersonal Communication from Ohio University (Athens), as well as a B.A. in Organizational Communication and Spanish from Capital University (Columbus, OH, summa cum laude). Her published work has appeared in the Review of Communication, Contemporary Argumentation & Debate, Journal of Public Affairs Education, and more. Her forthcoming book addresses issues of citizen debate in the policymaking process.

Bettina Seidman
Principal, SEIDBET Associates

Bettina Seidman is a well-known career management coach in private practice in Manhattan. She founded SEIDBET Associates in 1990, after a 20-year career in human resources management. Bettina consults to nonprofits on downsizing, terminations, and outplacement and coaches executive directors on human resources matters including, staff performance, progressive discipline, and conflict management. She also coaches executive directors and staff on improving interpersonal, presentation, negotiation, and political skills. Bettina works with her clients as a thinking partner, providing career and job transition counseling services including assessment, goal setting, networking tactics, resume development, and interviewing & negotiating strategies. Bettina works with clients on "sector change" (moving from corporate to nonprofit arenas) in one-on-one as well as workshop settings.

Bettina has contributed to articles and been quoted in major publications – in November, she was invited to blog for 3 days in The New York Times on career change. Recently, she has been interviewed for and quoted in articles in The Wall Street Journal, The New York Post, and Reader's Digest. Bettina has been an Instructor at New York University, Marymount Manhattan College, and Baruch College. She is a frequent public speaker and panelist. Bettina holds a BA degree in Psychology, an MBA in Industrial Psychology, and a Certificate in Labor Relations. She is a member of the NonProfit Resource Group, the Career Management Alliance, Governance Matters, Career Counselors Consortium, Association of Career Professionals International, and Career Development Specialists Network.

You can contact Bettina at SEIDBET@aol.com or 212.260.2026.

Edward Sermier
Former VP, CAO & Corporate Secretary; Director of Program Evaluations, Carnegie Corporation

I recently retired from my position as Vice President, Chief Administrative Officer and Director of Program Evaluation at Carnegie Corporation of New York (CCNY). CCNY is a private foundation with \$3 billion in assets. It was founded by Andrew Carnegie in 1911.

I also served as Chief Financial Officer of the New York Philharmonic Orchestra; Deputy Director

in the Mayor's Office of Operations for Mayor David Dinkins; Director of Strategic Planning and Capital Budgeting for the New York City Transit Authority; Director of Special Education and Budget Director for the New York City Board of Education.

I hold a Masters in Business Administration degree from Columbia University and a Bachelor's degree in mathematics from Manhattan College.

I currently teach two finance courses in the School of Public Affairs: PAF 9140 and PAF 9153. I also serve as President of the Executives On Campus (EOC) organization at Baruch College. The EOC program has approximately 200 executives from the for-profit and non-profit sectors who volunteer their time to provide mentoring and other services to Baruch students.

My e-mail address is: esermier@verizon.net. My cellphone # is 917-620-4393.

Susan Sweet

President, The Expedient Group

Former management consulting partner with 20+ years of experience leading complex information technology projects, involving personnel from multiple national and international business units, as well as implementing timely solutions for smaller start-up and non-profit companies. Recent projects include:

Helping clients increase efficiency and effectiveness of their organization including:

- reducing average invoice processing time to 7 days
- reducing month end close to 5 business days
- increase predictability of donation pipeline
- implement time tracking and project costing
- automating month end allocations

Package/application implementation support– work with client and vendor to communicate package capabilities (and shortfalls!) then help brainstorm and configure software to best meet client's business requirements. Assist client with developing and executing realistic implementation timelines that include:

- data cleanup,
- conversion
- testing
- training and
- implementation risk management

Package experience includes Peoplesoft, Epicor, Fundware, FRx, Tenrox, Pledgemaker, Claris Procurement and ADP applications.