

CONSULTING DAY FOR NEW YORK CITY'S NONPROFIT COMMUNITY

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THE CENTER FOR NONPROFIT STRATEGY AND MANAGEMENT

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Rhoda Barr
Private Consultant

Rhoda Barr, a board member of the League of Women Voters and the former Director of Client Services of VCG Governance Matters, is a graduate of the School of Industrial and Labor Relations of Cornell University and received her MBA from the Graduate School of Business and Public Administration at N.Y.U. Primarily responsible for Client Services, Ms. Barr works directly with the board and staff leadership of nonprofit organizations, consulting with them on the strengthening of their governing abilities. Clients assisted encompass the full spectrum of nonprofit endeavors, including American Music Center, Future Leaders Institute, Harlem Educational Activities Fund, Helping Hands, Martha Graham Center For Contemporary Dance, Multiple Myeloma Research Foundation, New York City Center For Charter School Excellence, Oxfam America, Sabin Vaccine Institute and World Education Services.

Before joining VCG in 1986, Ms. Barr worked for fifteen years in Westchester County building public/private partnerships for economic development and job training opportunities. As Deputy Director of the Private Industry Council, she collaborated with the leadership of major corporations on identifying needs, establishing policies, and providing funding for nonprofit agencies. As Director of the Job Development Center, Ms. Barr developed and directed the public/private Youth Employment Service and Summer Jobs for Youth programs.

Ms. Barr is also the founder and a trustee of the Corporate Community Jobs Project, which won national recognition as an outstanding model of business and community partnership. She has taught Labor Economics at Mercy College and Women in Management at Iona College.

Ms. Barr has for many years made her home in Hastings-on-Hudson where she is alternate member and former Chair of the Planning Board and past President of the League of Women Voters. She is recognized in Who's Who in American Women, was included in the first edition of Women in Westchester, and has been honored by Westchester County for "having made an important contribution to the quality of life."

Joan Straussman Brandon
Private Consultant

Joan Straussman Brandon is the Director of Programs of the Housing and Community Development Network of NJ. Her responsibilities include assisting with the development, implementation, and oversight of all TA and training programs. Prior, Joan had been with NeighborWorks® America for twenty-five years before becoming a private consultant in 2006. While with NeighborWorks®, 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. For three years she worked exclusively on developing mutual housing associations. Joan also managed assessments of the network's more complex organizations, and was involved in the development of the PROMPT® review system. Joan was also responsible for more than sixty of the chartering reviews for new network affiliates. As a consultant, Joan has continued to do assessments, coaching, Board development, course development and training, and proposal reviews, including proposals for the National Foreclosure

Mitigation Program. Joan is a trainer at the NeighborWorks® Institutes providing classes on Measuring Impact. Prior to NeighborWorks® America, Joan was Executive Director of a multi-service organization in Chelsea, Massachusetts. 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.

John Braunstein

Director, Anthony Knerr and Associates

Mr. Braunstein is a Senior Consultant of the firm, has extensive experience in higher education strategy, organization, management, enrollment and planning.

He was earlier a Senior Associate in the Higher Education Consulting Group of Coopers & Lybrand, a Senior Consultant in Higher Education at KPMG Peat Marwick and a Principal in the higher education strategy and financial analysis practice of The Stillwater Group. His clients in these positions included Columbia University, Educational Testing Service, University of Maryland System, University of Missouri, MIT, New York University Stern School of Business, University of Chicago Law School, University of Pennsylvania and Yale University.

Mr. Braunstein has also served as Associate Provost for Enrollment and Planning at Hebrew Union College – Jewish Institute of Religion; Interim Associate Provost for Enrollment Management and Dean of Admission at Franklin and Marshall College; Vice Provost for Enrollment Management at Iona College; Associate Director of Admission at Oberlin College; and Assistant Director of Admission at Brown University.

He has written and spoken widely on higher education strategy, planning, financing and athletics.

He received his B.A. degree in semiotics from Brown University and his M.B.A. in management of organizations and marketing from Columbia University. He also participated in the Management Develop Program of the Harvard Graduate School of Education.

John Casey

Associate Professor, Baruch College

John Casey has published extensively and given numerous presentations in the fields of government-nongovernment relations, immigration policy, policing, and university teaching. From 1999 to 2007, he was a Senior Lecturer in management, leadership and governance at the Australian Graduate School of Policing and Charles Stuart University in Sydney. He was also a visiting lecturer in criminal justice at the University of Maine at Augusta and the Universitat Autònoma de Barcelona and an adjunct lecturer in community management at the University of Technology in Sydney.

Before his academic career, Dr. Casey worked as a public sector and nonprofit manager. From 1992 to 1998, he was the Executive Officer of the Masters in Public Management program at a three university consortium in Barcelona, Spain and a consultant to the European Union working on public sector development in Eastern Europe. Previously, he had been the Director of the Mayor's Office of Adult Literacy for the City of New York, USA and a social services manager in Sydney, Australia.

He received his PhD from the Universitat Autònoma de Barcelona.

Susan M. Chambré
Professor, Baruch College

Susan M. Chambré is a Professor of Sociology at Baruch College, City University of New York. Her Ph.D. is from the University of Pennsylvania. She has been conducting research, teaching and doing pro bono consulting about volunteerism and nonprofit organizations for three decades.

Her publications include three books and numerous articles in scholarly and practitioner journals. The books include *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*.
Law School.

John Corwin
Founder, Corwin Consulting, LLC

Mr. Corwin has worked for his entire 40-year career in the nonprofit/public interest sector. Through Corwin Consulting, LLC, he serves as interim CEO for nonprofits undergoing leadership transition anywhere within the contiguous United States. He is currently the Interim Executive Director at the Institute for Global Ethics, in Camden, ME, his 11th such engagement. He has also been Interim CEO at The Way to Work; the Harlem School of the Arts; the New York eHealth Collaborative; Reach Out and Read, in Somerville, MA; the American Liver Foundation (national headquarters); Learning Leaders, Inc., which recruits, trains and supports 14,000 volunteers 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 Friends of UNFPA); and the African Medical & Research Foundation (USA). Earlier, he was Executive Director of The Glaucoma Foundation. Previously, Mr. Corwin practiced law at The Legal Aid Society, the Center for Constitutional Rights, and the New York Attorney General's office, where he was lead counsel in the Love Canal litigation and later Chief of the Consumer Frauds and Protection Bureau. Mr. Corwin served four years on the Greater New York AFP Chapter's Board of Directors, and six years as a member of the Public Service Network Committee of the NYC Bar Association. He holds memberships in BoardSource, the Alliance for Nonprofit Management, the American Society of Association Executives, Governance Matters, and the NY Technical Assistance Providers (NYTAP), and is affiliated with the Support Center for Nonprofit Management in New York. Mr. Corwin graduated from M.I.T. and Harvard Law School.

Joseph Cruickshank
Consultant

Joseph Cruickshank worked for Church World Service, The Halsted School, American Farm School, Recording for the Blind, and his own consulting firm prior to becoming Executive Director of The Clark Foundation. In retirement he taught in the Graduate School of Public Affairs at

Baruch College, served on the Board of several nonprofit organizations, and had been engaged in numerous volunteer activities.

Michael Davidson
Board Coach

Michael Davidson, is a consultant specializing in nonprofit board development, management support, strategic planning, leadership transition, and executive coaching for nonprofit managers. He has over 20 years' experience in nonprofit board and managerial leadership and has provided board training and retreat facilitation for more than 80 nonprofit organizations. He is the former Chair of Governance Matters, lead consultant for the BoardServe NYC program of the United Way of New York City and a member of the faculty of the Milano School of Nonprofit Management at the New School University.

He has been a Peace Corps Volunteer, an Assistant Professor of Anthropology, 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.

Michael A. Feller, MBA, EdD
Assistant Professor, Baruch College School of Public Affairs

Dr. Feller is an assistant professor in the Baruch College School of Public Affairs and a principal with Strategic Philanthropy Advisors, LLC, providing consulting services to enhance the internal procedures and maximize the external impact of grantmakers, social investors, government agencies, schools, and nonprofit organizations.

During a twenty-one year career at JPMorgan Chase and its predecessors, Dr. Feller 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. Prior to this, he was Senior Vice President for Community Relations covering New York, New Jersey and Connecticut.

Before joining JPMorgan Chase, Dr. Feller worked for eleven years in inner city schools in New Rochelle and New York City, most of that time in East Harlem where he founded and directed an alternative junior high school. Later he served as the Director of Program Development and Evaluation in the District's Office of Funded Programs.

Dr. Feller 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).

Paul Firstenberg

Adjunct Professor, Baruch College, School of Public Affairs

BUSINESS AND LEGAL EXPERIENCE

Executive Director of American ORT. (2001-to present) American ORT is part of a global federation that administers and supports schools in nearly 60 countries throughout the world. ORT uses state-of-the-art technology to provide students with the training to earn a living and foster economic self-sufficiency. Now in my fourth year. Increased fund raising by 30%, recruited new leadership and scaled back operating expenses by restructuring staff and benefit programs.

General Partner, Zuckerman, Firstenberg & Co. (1992-2001)

Provided broad range of strategic, management, and financial advisory services to publicly traded companies, privately held business firms and foreign governments. Advised Russian Government on the creation of a private real estate market. Created for the Polish American Enterprise Fund a Polish institution to provide capital to Polish housing developers. Mr. Zuckerman, former treasurer of Chrysler, RJR and IBM, died in 1999.

Continued consulting to businesses and nonprofits, including serving on management committee of private advertising display company, raising the funds for a year-long celebration commemorating the 200th anniversary of the U.S. Military Academy at West Point, and restructuring the management of a nonprofit dedicated to developing an AIDS vaccine.

CFO and then Executive Vice President of the Real Estate Investment Arm of the Prudential Life Insurance Co. (1985-1989)

Initially recruited as chief financial and administrative officer of the Group and then promoted to EVP responsible for equity investment of \$20 billion in assets comprising the Prudential's own funds as well as investments managed for pension funds; developed new investment strategy which improved returns; also headed the marketing of real estate services to pension funds; reversed loss of funds under management.

Managing Executive (COO) of the international law firm, Kaye, Scholer, Fierman, Hayes & Handler (1983-1984)

Responsible for strategic planning, financial operations, business development of 300-attorney international law firm.

Executive Vice President (COO) of Children's Television Workshop (1976-1983)

An international communications company that produces television programs ("Sesame Street") and other products for children. Elected to the Board of Directors in 1984 and named EVP and COO in 1976 until 1983. All divisions reported to me as COO including television production, publishing, licensing and staff functions. Reorganized the company to focus its activities on children's television programming and related products, eliminating programs for adults, selling off a radio and a cable station and closing down unsuccessful motion picture production division, steps which put the company in the black; started its highly successful investment fund.

Officer-in-Charge of Program Related Investments for the Ford Foundation (1970-1972)

Formulated the initial policies and strategies for new \$50 million investment fund of the Foundation for investment in projects in which the foundation had a program as well as a financial interest. Funded community economic development programs in minority neighborhoods.

Director of International Finance for the Atlantic Richfield Co. (1966-1970)

Arranged non-recourse debt financing for international joint ventures in Europe, Japan, and the Middle East.

Law Practice (1959-1965)

Law clerk to Chief Judge of the United States Court of Appeals for the 2nd Circuit. Practiced corporate law with New York City law firm before joining the U.S. foreign aid program.

Directorships

Director for 12 years (1974-1986) of the Vanguard Group of Investment Companies, the nation's second largest mutual fund complex, and Director of Sizeler Properties, a New Orleans based publicly traded real estate investment trust (1989-1992).

Lee Pesky Learning Center. Member of the Board of Directors of this nonprofit dedicated to assisting the learning disabled.

Education

Princeton University. Undergraduate degree from Princeton University (Woodrow Wilson School of Public and International Affairs) 1955, phi beta kappa, cum laude

Harvard Law School. Doctor of Jurisprudence from Harvard Law School 1958

Linda Franciscovich

Executive Director, The Grossman Family Foundation

Linda Franciscovich is the Executive Director of The Grossman Family Foundation, a newly formed foundation dedicated to improving the quality of life of low income children in Connecticut.

Over the last 20 years, she has advised families in all areas of philanthropy, including gift planning, mission and program development, governance, and succession planning. Prior to joining The Grossman Family Foundation she held positions as Vice President of Development and Philanthropic Services at the Fairfield County Community Foundation, Connecticut and Managing Director of Private Philanthropy at U.S. Trust Company.

Her speaking engagements include the Council on Philanthropy, Philanthropy New York (formerly NYRAG), The Philanthropy Roundtable, CASE, and area Community Foundations. She serves as a Director of The Berthe M. Cote Foundation and the Westport Public Library.

Phil Gartenberg
President, Fulcrum Associates

Dr. Gartenberg served as chief operating officer and chief financial and administrative officer for three New York State agencies—the Division for Youth, Department of Social Services and Department of Labor—where he worked closely with the not-for-profit community on human service program development and implementation.

Philip Gartenberg has a decades-long track record of leading organizations known for their stature in human services, philanthropy and education. He has held senior positions with two of the largest and most diversified philanthropies in the United States—the UJA/Federation of Jewish Philanthropies of Greater New York and the American Friends of The Hebrew University. UJA/Federation has both an international and domestic agenda. It supports over 100 agencies in the New York metropolitan region dealing with the entire spectrum of human services as well as assisting comparable services abroad. The American Friends of the Hebrew University is a nationwide organization focused on supporting a world class center of higher education in Israel.

In senior positions in both organizations, he:

- Engaged in large-scale philanthropic development—regionally and nationally.
- Directed strategic planning initiatives in concert with agency executives and members of the board of directors.
- Designed and implemented programs to achieve organizational change.

In 2006, Dr. Gartenberg established Fulcrum Associates to provide consultant services to the non-profit community. Not-for-profit executives face the challenge of providing quality service and planning for the future with limited resources. At the same time, there is growing emphasis on meeting stringent standards of accountability set by boards of directors, external funding agencies and private philanthropists.

Dr. Gartenberg consulting practice has focused heavily on the human service community. He has provided strategic planning and program development assistance and he has worked extensively as “interim CFO” assisting a number of agencies during transition periods and advising them in their search for the full-time CFO. He has used both his experience as a government official and a senior executive in non-profit agencies to assess needs, provide critical assistance in matters related to rate setting, cash flow management, budgeting and liaison to agency boards and committees.

Kyra Gaunt
Adjunct Associate Professor, Baruch College

Dr. Kyra Gaunt is an Adjunct Associate Professor in Baruch's Sociology and Anthropology Department. This is her 4th year contributing to Consulting Day. As someone who connects people and curates media primarily via Twitter, she was one of 6 finalists in 2011 for a Special Nokia Connecting People Shorty Award, which she happily lost to a school librarian in Iowa who had 20K young people following her. She is a 2009 TED Fellow.

Rev. Alfred Gill***Executive Director, Neighborhood Housing Services of Staten Island***

Alfred Gill has been involved in the community economic development field for more than twenty (20) years. He has served in several capacities: as a consultant to community and faith based organizations across the country; in leadership capacities in regional, national and local community based organizations; and as an academic. He is currently the executive director of Neighborhood Housing Services of Staten Island.

Alfred holds a Masters in Community Economic Development from the Southern New Hampshire University and is a PhD student at Prescott College in Sustainability Education with a focus on Sustainable Development.

Hank Goldstein***Principal, The Oram Group, Inc.***

Henry (Hank) Goldstein (hankus@oramgroup.com) is one of two principal partners of The Oram Group, Inc., (www.oramgroup.com) consultants to philanthropic organizations, with offices in New York and San Francisco. He is past chair of Giving USA Foundation, and former chairman and president of the Association of Fundraising Professionals (AFP) nationally and in New York.

Clients have included Chautauqua Institution, 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, New York Urban League, Actors Fund of America, Jewish Senior Life (Rochester), Corporation for Enterprise Development, Howell Living History Farm and many others in recent years. Mr. Goldstein has been an advisor to foundations and families of wealth with emphasis on giving strategies and grantees' accountability issues. Foundations served include Kresge and Ford. Ford and Rockefeller Brothers Fund have previously referred organizations to Oram for client services. Hank is immediate past president of the board of trustees of Women's Prison Association, Chairman of PICO National Network, former trustee and treasurer of Jazzmobile and trustee emeritus of Berkshire Theater Festival. Mr. Goldstein serves on the national scholarship award committee of the Jackie Robinson Foundation.

He has recently received a Muskie MAX Grant Mentorship Award and will be working with NGOs in Kyrgyzstan later this year. Hank is co-author of *Dear Friend, Mastering the Art of Direct Mail Fundraising* and *So You Want to be a Consultant!* was published in 2006. 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 The New School for Public Engagement/ Milano School of International Affairs, Management, & Urban Policy. He has overseen 300 studies of nonprofit organizations by his graduate students over 20 years of teaching.

Kathy Herre***Interim Development Director and Development Consultant, Herre Consulting***

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 2007, Ms. Herre launched Herre Consulting to provide interim fundraising and management services to non-profits. She has been Interim Vice President for Development at the National Breast Cancer Coalition, Interim Development Director at the Women's Refugee Commission, and Interim Development Director at the National Council for Research on Women and has worked with the Himalayan Cataract Project to develop a strategic plan.

Wayne Ho***Chief Program and Policy Officer, Federation of Protestant Welfare Agencies***

Wayne Ho is the Chief Program and Policy Officer of the Federation of Protestant Welfare Agencies, where he oversees policy advocacy, member and faith based, and capacity building initiatives to advance economic opportunity for vulnerable New Yorkers. Previously, he served as the Executive Director of the Coalition for Asian American Children and Families, the nation's only pan-Asian children's advocacy organization. Wayne currently serves on the Board of Directors of Coro New York Leadership Center, New York Foundation, and Partnership for After School Education and is a member of several City and State advisory boards. He has taught leadership and management courses at NYU and UC Berkeley, been the administrator of out-of-school time programs for San Francisco Unified School District, and received awards from nonprofit organizations, government agencies, and elected officials. Wayne holds a B.A. from UC Berkeley and an M.P.P. from Harvard University's Kennedy School of Government.

Sonia Jarvis***Distinguished Lecturer, Baruch College, School of Public Affairs***

Sonia R. Jarvis, Esq. is currently a Distinguished Lecturer at the School of Public Affairs, Baruch College, City University of New York. She first joined Baruch College as the Lillie & Nathan Ackerman Visiting Distinguished Associate Professor of Equality and Justice in America responsible for teaching and developing programs to engender a thoughtful dialogue on issues of race, equal justice and ethnicity. A graduate of Stanford University (with B.A. degrees in Political Science and Psychology) and Yale Law School (J.D. degree), Professor Jarvis is an accomplished scholar whose research and teaching focus on race, public policy, nonprofit organizations, and the media.

She has extensive experience in both the private and public sectors including her solo private law practice in Washington, DC that focuses on civil and human rights, nonprofit organizations and small minority businesses. Additionally, she has provided leadership on policy and governance issues to a number of non-profit organizations in various roles as manager, general counsel, and

board member, including the National Coalition on Black Voter Participation, Inc., where she served as its Executive Director as well as her past positions a Senior Consultant to the President's Initiative on Race during the Clinton Administration, and as past president of the Black Women's Agenda. She is a frequent commentator on public issues such as the Census and has been interviewed by almost every major media outlet in the country, such as National Public Radio, the Washington Post, PBS and CNN. She is currently engaged in research and writing about the interaction of race, media and politics, and the urgent problem of lack of access to higher education by minorities, low income families and immigrant youth.

Heather Joseph
Volunteer Engagement & Management Consultant

Heather A. Joseph is a seasoned Volunteer Engagement and Management professional. She has in various volunteer management capacities at The National Multiple Sclerosis Society, NYC-Southern NY Chapter, PENCIL, Inc. and the Food Bank For New York City. Heather is the Co-chair for the National Advisory Council of Hip Hop 4 Life, was a 2011 Council of Urban Professionals Fellow; and 2010 National Council For Research on Women AMEX Fellow. Heather received a BA in English and Sociology from Binghamton University and a MS in Nonprofit Management from The New School University.

Gregory King
Principal, Strategic Philanthropy Advisors, LLC

Gregory King became co-founder of Strategic Philanthropy Advisors, LLC, after 18 years at the JPMorgan Chase Foundation and its predecessors, where he served as a senior grants officer and as the Foundation's Secretary. He designed and managed numerous philanthropic initiatives to address 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.

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

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

Barbara Krasne
Managing Director, KrasnePlows

Barbara Krasne is the managing director and co-founder of KrasnePlows, a boutique consulting firm that specializes in mergers and collaborations, planning and restructuring, and leadership development and succession planning for nonprofits and foundations across all program areas.

For more than a decade KrasnePlows has helped organizations figure out ways to serve their clients more effectively. Earlier in her career, Barbara held leadership positions in the advertising, media, education, and art worlds, including at *USA Today International*, *Publicitas*, and *Artnet.com*, among others. She has built businesses from the ground up as well as helped to rescue troubled enterprises, experience that she often taps when serving KrasnePlows clients.

A former CEO, Barbara is experienced in multiple 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 30 years. She understands technology and has consistently used it to help foster successful enterprises.

Barbara serves on the selection committees of the New York Nonprofit Excellence Awards, established by the New York Times, Nonprofit Coordinating Committee and Philanthropy New York, as well as the Brooke W. Mahoney Award for Outstanding Board Leadership. She is a frequent speaker about mergers and collaborations in the nonprofit sector.

Barbara serves on a number of corporate and nonprofit boards, frequently as an officer and member of the executive committee, including Christopher Norman Chocolates, and formerly Inwood House, the Parent-Child Home Program, Governance Matters and Body Positive.

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

David LaGreca

Executive Director, VCG Governance Matters

Mr. LaGreca is the Executive Director of VCG Governance Matters, where he earlier spent eight years as a consultant. He works with clients on issues of strategy, board recruitment and leadership. Prior to this position, he founded The LaGreca Company (TLC) in 1999. David has extensive experience assisting corporate and nonprofit executives with strategy, performance coaching, and refining business operations. Between 2004 and 2008, he served as Interim Executive Director for five nonprofit organizations. His past work for clients ranges from a \$30M merger of two social service agencies in Manhattan to the dissolution of a long established workforce program. He is one of the founders and former Board Chair of JOBSFIRSTNYC, an intermediary organization focused on out-of-school, out-of-work young adults. A graduate of the Katholieke Universiteit te Leuven, Belgium, and a former priest, Mr. LaGreca received his MBA in Management and Marketing from the Columbia University School of Business. Before joining VCG in 1991, David was the Administrator for the Department of Surgery, Memorial Sloan Kettering Cancer Center. He also taught at Boston and Providence Colleges, wrote a newspaper column in Rhode Island, and spent over twenty years working with community-based health care organizations caring for terminal patients. David has contributed chapters in the following books: *Secrets of Successful Boards: The Best from the Nonprofit Pros (Chairing a Board)*; *Secrets of Successful Fund Raising (Fundraising in the Corporate Community)*; and *Secrets of Successful Retreats (Implementation Issues Surrounding Strategic Planning)*. David splits his time between Manhattan and his place in Rockland County.

Sandra A. Lamb***President and CEO, Lamb Advisors, LLC***

Sandy Lamb founded Lamb Advisors LLC in 2003 to advise nonprofits on strategic alliances and change solutions. She comes to this work after a career as a portfolio manager in the MONY Group and a managing director at the investment bank, Lazard Freres & Co., where for 20 years she was responsible for mergers and acquisitions as well as complex corporate financial advisory assignments. Since forming Lamb Advisors, Sandy has assisted nonprofits with researching, analyzing, investigating, structuring, and completing collaborations and other partnership structures including strategic alliances, mergers, and acquisitions. She has served on the board and audit committees of several stock-exchange-listed companies and nonprofit organizations. She currently serves on the board of Pittsburgh Theological Seminary (Vice Chair), CURE International, and the Vera Institute of Justice. In 2001-2002, Sandy was Chair of the New York Women's Foundation, and until 2011 she was Treasurer of the Taproot Foundation.

Traci Lester***Executive Director, Reach Out and Read of Greater New York***

Traci Lester has been the executive director of Reach Out and Read of Greater New York since 2004. The organization's mission is to prepare America's children for success in school by partnering with doctors to prescribe books and encourage families to read together. For the past nine years, she has been responsible for overseeing 180 member programs and serving over 280,000 children annually. With an eighteen-member Board of Directors, thirteen-member Advisory Board, and nineteen-member Young Leaders Board she has doubled the number of programs and raised close to \$7 million dollars from public and private sector sources.

Ms. Lester has over 20 years of experience in nonprofit management, community development, and education. Before joining Reach Out and Read of Greater New York, Ms. Lester held numerous positions, including Administrative Officer of the F.B. Heron Foundation, a \$300 million New York City-based private philanthropy; Director of Development for the YWCA of New York City, a \$15 million human services organization; Elementary School Teacher in Brooklyn, New York; and began her career as a Reporter for The San Jose Business Journal in San Jose, California. She earned a BS from Georgetown University's School of Foreign Service, a MBA from Rutgers University Business School, a MPA from California State University, and a Certificate from the Institute for Not-for-Profit Management at Columbia University.

Ms. Lester is the recipient of the American Association of University Women's Selected Professions Fellowship, The National Association of Health Service Executive's Community Service Award, and has served as a Fellow in The San Francisco Foundation's Urban Affairs Program. She is a member of the Greater New York Association of Fundraising Professionals, American Society for Public Administrators, and the Pi Alpha Alpha Honor Society. She was also named to TheGrio's 100 List for 2012 as an African-American history maker and industry leader making a difference in the field of Education.

She serves on other boards and commits much of her volunteer time to organizations that are dedicated to improving the lives of children, such as Spence-Chapin Adoption Agency.

Peter Levinson***Principal and Creative Director, LevinsonBlock, LLC***

For over 20 years Peter has led LevinsonBlock LLC, a firm providing effective marketing and design for businesses and organizations. During this time, he has worked in partnership with business and organization executives to deliver a strategically driven, responsive creative process.

He has successfully re-aligned clients' brand and communications with target audiences; transformed websites to make them usable and effective; and enabled his clients to persuasively promote their businesses through a variety of media. His broad experience in marketing and design enables him to play a variety of roles on his teams; from project manager to creative director to troubleshooter.

Peter has received a National Endowment for the Arts Fellowship. His work has received an American Graphic Design Award and appeared in Designing for the Greater Good, an annual of great marketing for non profits. His work has also been selected for the Logo Lounge II Annual, Print Regional Design Annuals, and Print's Best Logos and Symbols.

Peter attended University of California at Santa Cruz as an Anthropology Major. He was born in New York City, and lives with his family in Brooklyn.

Peter is a board member of the Healthcare Public Relations and Marketing Society of New York (HPRMS).

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

Starting his business career at Procter & Gamble in brand management, Jim spent 31 years as Chairman/ Managing Director of Lisher & Company, Inc., a strategic planning and innovation development company that was retained by over 70 Fortune 1,000 companies. In 1998, Jim brought the STRIVE job training program to Connecticut; and STRIVE now has active sites in Bridgeport, Hartford and New Haven, and has graduated over 3,000 participants into successful careers. While retired from active consulting practice, Jim still works part time, currently as a strategic consultant to Career Resources, Inc., the largest workforce development non profit in Southwest Connecticut with over 20,000 customers.

Jim also serves as Chairman of the New Canaan Health & Human Services Commission, currently leading a video tele-health pilot to allow seniors to age in place in their homes – this pilot is believed to be the first in the nation to use technology for leveraging senior wellness and healthy lifestyles. He has served on numerous government, non profit and community boards, and has been elected Chairman of five.

Valerie Lisiansky***Web and Graphic Design Consultant***

Valerie Lisiansky is a user experience and interface designer with a focus and interest in startups and nonprofit organizations. Her diversity of experience and skills cumulates in a dynamic and varied understanding of different models of communication which she is eager to share with up

and coming organizations. She has a background in animation and illustration, having worked on projects for Nickelodeon, Disney, and National Geographic, and has had her own work in film festivals worldwide. With a diverse knowledge of artistic methods and digital tools - she consults for various startup organizations throughout NY.

Nicole P. Marwell

Associate Professor, Baruch College, School of Public Affairs

Nicole P. Marwell is Associate Professor of Public Affairs and Sociology at Baruch College and the Graduate Center of the City University of New York, and Academic Director of the Baruch Center for Nonprofit Strategy and Management. She received her Ph.D. in sociology from the University of Chicago in 2000. Her research examines nonprofit organizations, government contracting, local and state politics, and Latino communities. She has published in the American Sociological Review, City and Community, the Nonprofit and Voluntary Sector Quarterly, and the Annals of the American Academy of Political and Social Sciences. Her 2007 book, *Bargaining for Brooklyn: Community Organizations in the Entrepreneurial City* was published by the University of Chicago Press. Dr. Marwell has also held positions in the nonprofit and philanthropic sectors, including the Museum of Contemporary Hispanic Art, the AT&T Foundation, and the Levi Strauss Foundation.

Patricia Northrop

Senior Counsel, WNET

Ms. Northrop is Senior Counsel at WNET, parent company of public television stations THIRTEEN, WLIW21, and NJTV. At WNET, Ms. Northrop advises her internal clients with regard to nonprofit governance requirements, tax issues, and fundraising laws. She also serves as Assistant Corporate Secretary for NJTV, liaises with the Board of Trustees, and handles trust & estate matters.

Prior to joining WNET in 2011, Ms. Northrop served as an Assistant Attorney General in the Charities Bureau of the New York State Attorney General's Office, investigating fraud and abuse at nonprofit organizations. She was a 2009 recipient of the Attorney General's Louis J. Lefkowitz Memorial Award. Before her move to the nonprofit sector, Ms. Northrop was a litigation associate at Davis Polk & Wardwell and Richards Kibbe & Orbe.

Ms. Northrop received her J.D. cum laude from Duke University School of Law, where she was articles editor for the Duke Law Journal, and received her B.A. cum laude from the College of William & Mary. She clerked for the Hon. Deanell Reece Tacha of the U.S. Court of Appeals for the 10th Circuit.

Bonnie Osinski

Fund Development Consultant, Osinski Development Resources

Bonnie Osinski is head of her own consulting practice, Osinski Development Resources (www.bonnieosinski.com). Her services include fundraising management; planning, coaching and customized group training for nonprofit leaders and development staff; building development departments; and serving as an interim/part time development director. Her affiliation with McGee Fund Raising Counsel enables her to provide public and private grant seeking services supported by more than 75 years of combined fundraising and nonprofit management experience.

During more than 35 years in the nonprofit sector, Bonnie has served as Director of Development for, The Glaucoma Foundation, Goodwill Industries, Graham-Windham Services, YWCA of the U.S.A., The Door, and, CAMBA, Inc. During her career, she has built several development departments from the ground-up. Short term and interim assignments included managing development for The National Hemophilia Foundation, Inform, Inc. and the National Eating Disorders Association.

As a teacher and workshop presenter, her clients included The Association of Junior Leagues International, Partnership for the Homeless, The Legal Services Corporation, various New York City Government agencies, United Way Junior Fellows Program, Dress for Success Worldwide, and numerous national and local nonprofits throughout the country. Bonnie was a lecturer in the summer Nonprofit Management Institute at NYU's Robert F. Wagner Graduate School of Public Service for ten years. She was awarded the Mayor's Voluntary Service Award for her work as a volunteer trainer with the Support Center for Nonprofit Management. She was also on the faculty of the United Way Junior Fellows Program at Baruch College.

As a consultant, her clients included Partnership for the Homeless, The Open Housing Center, ActionAids, The Hetrick Martin Institute, One Stop Senior Services, Achilles Track Club, Comp2Kids, Christ Church, Tarrytown, Save Our Everglades, American Skin Association, Training Institute for Mental Health, and the National Minority Aids Council. She serves on the board of directors of LeAp, Learning through an Expanded Arts Program.

Bonnie holds an MPA from the Robert F. Wagner Graduate School of Public Service at NYU

Joe Porrino

Consultant, COO, The New School

For his entire professional career, Joseph Porrino has served and advised non-profit organizations in a variety of fields. First as a labor and employment lawyer, then as chief operating officer of a major university in New York City, and, most recently, as a management consultant, Mr. Porrino has helped numerous non-profits address organizational issues and solve managerial problems. Representative Clients: Middlebury College, Fordham University, the New School, Barnard College, Hunter College, Ringling College of Art and Design, DirectSource Healthcare, Wyckoff Heights Medical Center, Monterey Institute of International Studies, Bank Street College of Education, the Actors Studio, Sotheby's Institute of Art, the Stella Adler Studio, and the Masters School.

Representative Assignments:

- Mergers, affiliations, and other strategic alternatives
- Organizational reviews
- Contract negotiations (food service, affinity agreements)
- Regulatory reviews and submissions (federal and state)
- Board governance
- Real estate transactions
- Analysis of policies and procedures
- Government affairs
- Employee communications
- Retirement incentive programs

In addition to his work as an adviser and consultant, Mr. Porrino has regularly served as a

member of various non-profit boards of directors, including the New York Organ Donor Network, the Milano Graduate School at the New School, the Union Square Partnership, and the Actors Center.

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Evelyn Roberts

Former Director, Foundation Relations, Baruch College

Evelyn Roberts most recently served as Director of Foundation Relations for Baruch College, where she was responsible for private foundation relationships and fundraising for the College. In that role, she initiated, developed, and maintained relationships with foundations, and worked with the College's president, deans, vice presidents, center and institute directors, and other faculty and administrators to develop fundable projects and write proposals for foundation funding.

Evelyn came to Baruch after many years of diverse experience at universities and not-for-profit organizations in fundraising, program and executive management, communications, and teaching. Prior to joining Baruch, Evelyn was Director of Development for Services for the UnderServed, a large social service agency, and served as Executive Director of the New York City affiliate of the National Alliance on Mental Illness (NAMI).

Previously, Evelyn held positions as a major gifts officer for the University of Rochester's New York City regional office, program/curriculum coordinator for The New School's Communication Department, coordinator for the Modern Language Association's three-year FIPSE-funded project working with college and university English departments nationwide to reconsider their curricula and teaching practices, and visiting assistant professor at Wesleyan University.

Dr. Roberts received her Ph.D. and M.A. from Brown University and her B.A. from the University of Rochester.

Michael Seltzer

Distinguished Lecturer, Baruch College, School of Public Affairs

Michael Seltzer, a Distinguished Lecturer at the Baruch College School of Public Affairs. Michael is the author of *Securing Your Organization's Future: A Complete Guide to Fundraising Strategies*, published by the Foundation Center. He has worked for and/or advised many foundations and nonprofit organizations both in the United States and around the globe over the course of his forty-five year career. In addition, he served as the president of the New York Regional Association of Grantmakers (now known as Philanthropy New York) and a program officer in the Governance and Civil Society unit of the Ford Foundation. He is a regular contributor to PhilanTopic, the Foundation Center blog.

Ed Sermier, Director

Chief Financial Officer, The Nation Institute

Ed Sermier currently serves as Chief Financial Officer for the Nation Institute. Ed has broad and deep expertise in the area of nonprofit finance. Most recently, he served as Vice President, Chief Administrative Officer and Director of Program Evaluation for Carnegie Corporation of New York.

He has 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; and Director of Special Education and Budget Director for the New York City Board of Education. He is an Adjunct Professor at Baruch College in New York City, teaching graduate-level courses in strategy, nonprofit finance and nonprofit management / leadership. He serves as president of the Executives on Campus organization at Baruch College. He received his MBA degree from Columbia University and his BA degree in mathematics from Manhattan College.

Don Waisanen

Assistant Professor, Baruch College, School of Public Affairs

Don Waisanen is an assistant professor of communication in the Baruch College School of Public Affairs, where he teaches courses and workshops in public communication—including advanced speech training, campaign and advocacy strategies, media analysis, and special topics seminars on leadership and humor. All his research projects seek to understand how communication works to promote or hinder ethical and effective discourse and the force of citizens' voices in public life. Before entering academia, Don was a Coro Fellow in Public Affairs, and worked in broadcast journalism, as a speechwriter, and on political campaigns. He has conducted communication strategy for various domestic and transnational projects, and serves on the board of the Resilience Advocacy Project, a nonprofit helping youth transition out of poverty. He writes for The Huffington Post, and has long enjoyed and been informed in his professional work by involvement in the performing arts, particularly improvisational comedy. He received a Ph.D. in Communication from the University of Southern California.

My consultations will focus primarily on communication strategies for nonprofits (e.g. social marketing, influencing various target audiences, digital media campaign and advocacy strategies, etc.), and secondarily upon individual communication skills for nonprofit employees and managers (e.g. speaking, writing, negotiation, interpersonal communication, the use of visual technologies for impact, etc.).

Janet Waterston

Consultant

Janet Waterston is a human resources and organizational development consultant with 25 years of experience helping individuals and organizations achieve workplace excellence. Her consulting expertise includes supervisory, leadership, and management development; employee relations; employment regulations; executive and management coaching; meeting and retreat facilitation; and organizational assessments. Prior to becoming a consultant, Ms. Waterston was the Managing Director of Employee and Volunteer Resources at GMHC, the oldest and largest nongovernment agency addressing HIV and AIDS, and held senior and corporate HR positions in the medical publishing and financial printing industries. Clients span the for-profit and nonprofit arenas and include hospitals, publishers, consulting practices, retail, environmental and advocacy organizations, schools, museums, membership organizations, and faith-based and social service agencies. Ms. Waterston has an MSW from NYU. JAWatersto@aol.com, www.hrworkplaceexcellence.com

Daniel W. Williams***Associate Professor, Baruch College, School of Public Affairs***

Professor Daniel Williams has taught Budgeting and Financial Analysis, and other topics at Baruch College since 1995. Before that he was the budget director for the Virginia Medicaid program for a decade and had other prior duties. He conducts research in budgeting, forecasting, performance measurement and other related matters. He has a Ph.D. in policy analytics from Virginia Commonwealth University and a M.Ed. and BA from University of Virginia. His most recent article is “The Politics of Forecast Bias: Forecaster Effect and other Effects in New York City Revenue Forecasting,” in Public Budgeting & Finance.