

CONSULTING DAY FOR NEW YORK CITY'S NONPROFIT COMMUNITY

CONSULTANT BIOS

BaruchCOLLEGE
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Baruch College
Newman Vertical Campus
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THE CENTER FOR NONPROFIT STRATEGY AND MANAGEMENT

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THE MORNING SESSION: 9:00AM – 12:00PM

Jeff Ballow

Consultant, Community Resource Exchange

Prior to joining CRE in May 2006, Jeff served in senior finance and operations positions at Women in Need and MOUSE. Jeff also served as Project Director at Cause Effective, where he focused largely on fundraising. Other professional experiences include direct service work in Chicago (around homelessness and HIV/AIDS) and magazine journalism in California. Jeff holds a Masters in Public Administration (M.P.A.) from the Wagner School of Public Service at New York University, and has completed additional coursework in accounting, human resources management, and counseling. At CRE, Jeff consults on a variety of areas, including financial management, human resources management, and planning. He is currently on the board of the Brooklyn-based Red Hook Initiative.

Rhoda Barr

Director of Client Services, Volunteer Consulting Group

Rhoda Barr, 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."

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.

Anne Finn
Senior Vice President, Social Services, National Executive Service Corps (NESC)

Anne Finn is Senior Vice President of the NESC Social Services sector since January 2011. Previously, Ms. Finn was an active NESC consultant working on and leading a broad range of NESC projects. Ms. Finn is a 30+ year veteran of magazine publishing. She was most recently Senior Vice President, Consumer Marketing, for Magazine Publishers of America (MPA), the consumer magazine trade association. Ms. Finn has a proven track record of leadership in developing industry standards and best practices through advocacy and collaboration with Board and member committees as well as external stakeholders. Ms. Finn received her BA in English Literature from Carleton College in Northfield, MN.

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.

Ed Sermier, Director

National Customized Services, Nonprofit Finance Fund (NFF)

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.

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

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 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.

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

2011 Fellow, Council of Urban Professionals, National Advisory Council

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.

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 has over 20 years of business line management experience, including managing a \$100 million product line and a staff of 80 employees at JPMorgan.

In her special brand of coaching, Ms. Keenan integrates coaching and consulting to create the most effective change program for her clients. Ms. Keenan serves as a 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 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, pursue new career goals and create high producing and more engaged teams.

Ms. Keenan brings a broad range of sales, management, leadership and organizational development expertise to her engagements. She understands the challenges executives face as they seek to meet aggressive business goals, motivate overworked staff and deliver excellent client service. Ms. Keenan has been very successful in helping executives craft strategies to meet these challenges.

Ms. Keenan was also very active in the JPMorgan's diversity program. As a member of the Corporate Diversity Council, she was responsible for setting the firm's diversity agenda. Ms. Keenan was selected to be a mentor in the firm's prestigious reverse mentoring program and helped shape senior executives views of diversity in their business unit.

During her tenure as Special Assistant to the Executive Director at the Enterprise Foundation, Ms. Keenan combined her business experience and exceptional leadership skills to implement a market segment team organizational structure to manage the Foundation's community based partner relationships. She also served as the Project Manager for the Foundation's successful implementation of a \$1Billion Promise program – one of the largest pledges ever made by a foundation in New York City for the creation of affordable housing.

Today, Ms. Keenan is working with executives in both the corporate and non-profit sectors. In addition to her coaching clients, she is working on engagements that involve team building, change management, project management, human resource management, leadership development and training and relationship management.

Ms. Keenan earned a BA from Douglass College and a MBA from University of Wisconsin. She is a graduate and certified coach from New York University's Executive Coaching Program. She has served as Chairman of the Board for the Community League of the Heights, New York City and is a member of the International Coaching Federation.

For more information about DKB Consulting and Debra's work please contact Debra at: 973.902.7218 or debra@dkconsulting.net

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.

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.

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.

Sergio Sedita

Regional Director, Long Island/ Coordinator of Consultants, National Executive Service Corps (NESC)

Sergio Sedita joined Chemical Bank (now Chase Manhattan) after graduating from Brooklyn College. During his 39 years with Chemical Bank, Mr. Sedita held a wide range of positions from Branch Management to Marketing and Product Development. Most recently he worked for Chase's Small Business Group, where he held project management responsibility. In this role, Mr. Sedita was instrumental in the design and initial implementation of a Relationship Management Model for selling and servicing small businesses.

Since his retirement, Mr. Sedita has gained a wide breadth of experience in the nonprofit world, having been involved in a variety of consultancies from strategic planning to branding and marketing. He managed the Long Island region for NESC from 2008 to 2010.

Mr. Sedita holds both a BA and an MA in Economics from City University and has done post-graduate work at New York University

Jenna Silverman

Marketing Manager, Big Duck

Jenna Silverman is the Marketing Manager at Big Duck. Since 2009, Jenna has facilitated Big Duck's marketing and outreach efforts, which includes overseeing the website, blog, social media accounts, and speaking engagements. Through a partnership with Darim Online, she coached several Jewish Day Schools through the process of developing and implementing social media strategies to build relationships with alumni, students, and families. Jenna has also led workshops to help local nonprofits understand how best to dive into social media. Before Big Duck, Jenna was a member of the Hillel International Board of Directors, Masa Israel Journey campus representative, and BBYO intern. She holds a Bachelor of Arts degree in Communications and Jewish Studies from the University of Maryland in College Park.

Joseph Townsend

Senior Vice President, Social Enterprise, National Executive Services Corps

Joseph J. Townsend has been a Senior Financial/Operations Executive with Club Med Inc. and has extensive experience in the international resort/leisure industry. He has broad organizational background and accomplishments. From 1984 to 1997 he was successively Treasurer, Secretary Treasurer and Senior Vice President for Club Med Inc. (NYSE).

Previous to that he was, from 1972 to 1984, at first Controller and then Senior Vice President and CFO for Club Med Sales Inc. (marketing company). He has had various additional professional accounting/financial experience at the Kenton Corporation (retail), International Telephone and Telegraph and Holt Rinehart and Winston (publishing).

From 1998 until 2006, Mr. Townsend was an investor and provided financial/operations consultant services in the International resort/leisure industry.

In 2008, Mr. Townsend was appointed Senior Vice President for Social Services at National Executive Service Corps (NESC). He is leading the NESC Social Enterprise Initiative and has been a consultant with NESC since 2006.

THE AFTERNOON SESSION: 1:00PM – 4:00PM

Cristina Balboa

Assistant Professor, Baruch College, School of Public Affairs

Cristina Balboa's research incorporates international relations, comparative policy and organization theory to demonstrate how internal organizational traits (i.e. capacity, structure, ethos, diversity and leadership) contribute to or detract from the balanced accountability of the political institutions of private governance – from nonprofits to networks, certification mechanisms, and global governance organizations. Her dissertation – “When Non-governmental Organizations Govern: Accountability in Private Conservation Networks” – was awarded the 2010 Gabriel G. Rudney Memorial Award for Outstanding Dissertation in Nonprofit and Voluntary Action Research from the Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA). She has also been awarded fellowships at Harvard University's Hauser Center for Nonprofit Organizations, the U.S. Environmental Protection Agency's Science to Achieve Results (EPA-STAR) program, the Switzer Foundation and the Environmental Leadership Program, where she currently serves as a Senior Fellow. Prior to her academic work, Cristina spent almost a decade working in nonprofits in Washington D.C. and Ecuador on environmental issues in Latin America, Southeast Asia and the Pacific. She received her Ph.D. from Yale University in Environmental Policy and Governance, Masters Degrees from Johns Hopkins University and Yale University and a Bachelor's degree from the University of Michigan – Ann Arbor.

John Braunstein

Senior Consultant, Anthony Knerr & Associates

John M. Braunstein, 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.

Susan Chambré
Professor of Sociology, 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*.

Hilda Chazanovitz
Hilda Chazanovitz Partners

With a proven track record in business and with nonprofits, we embrace the mission of an organization with our hearts and adapt smart business thinking for social impact. We focus on the intersection of leadership, fulfilling mission and financial health. And we partner with our clients on mission and vision development, business planning, marketing and communications, board building, fundraising, and creating alliances and partnerships.

Since 1996, Hilda Chazanovitz and her associates have created solutions for emerging and established organizations and companies, including The Gordon Parks Foundation, Wellness in the Schools, FamilyCook Productions, UJA-Federation of New York and its network of affiliated agencies, YIVO, The Vera Institute, The Arts and Business Council, Citigroup, Motorola, National

Geographic, American Express, The History Channel, E! Entertainment, The Jewish Museum and The Anti-Defamation League.

Prior to 1996, Hilda was a founding officer and Vice President of Marketing of the largest transactional television platform in the US (Video-on-Demand) and held senior Marketing and New Business Development positions at Viacom Inc. She also launched a division of Foote Cone Belding and managed clients across various sectors for Young & Rubicam and Wunderman, Ricotta & Kline.

Hilda has most recently been a trustee for the Pearl Theatre Company and CEC ArtsLink, and currently serves on the Conference Planning steering committees at the James Beard Foundation, the Advisory Board at Wellness in the Schools.

Trained in the art of storytelling, Hilda has performed at various venues in New York City and is committed to the power of storytelling to inspire and engage support at every level.

She is a Phi Beta Kappa graduate of the City College of New York and studied at the graduate level in Nonprofit Management, Business and Fundraising.

Michael Feller
Principal, Strategic Philanthropy Advisors, LLC

Michael is 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, 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. 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 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.

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 adjunct assistant professor in the School of Public Affairs at Baruch College, City University of New York.

John Corwin
Interim Chief Executive for Nonprofits, 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.

Linda Felstein

Senior Finance & Budget Analyst, Manhattan Borough President Office

Linda Felstein is the Senior Finance and Budget Analyst for the Office of the Manhattan Borough President, Scott M. Stringer. She is responsible for the programmatic grants administered by the office and provides technical support for Manhattan-based nonprofits. Linda has extensive experience within the financial industry working with several Fortune 500 companies. Linda has worked as a consultant within the nonprofit community assisting small and large organizations with fundraising initiatives. Linda has a BBA in Finance from Baruch College and a MS in Fundraising from NYU.

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.

Bonnie Osinski

Independent Consultant, Associate, Mcgee-Riley Associates

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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 Fundraising 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, 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

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

Danny Rosenthal ***Consultant***

Over the last 20 years, I have been fortunate to serve in numerous settings in the nonprofit and public sectors in New York City and to play a variety of roles in realms including management, government affairs, strategic planning, fundraising and communications. Over this period, my belief in the ability of inspired organizations to improve society in profound ways has grown stronger, as has my appreciation for the qualities that characterize the organizations that make the most indelible imprints: enlightened leadership, clear direction, intensive focus and a willingness to take intelligent risks. At the same time, I fully recognize the complexities inherent in management, especially during times of economic constraint, and that innovation can seem a luxury. My aim, then, is to offer myself as a catalyst and source of creative direction to excellent organizations seeking to surmount challenges and achieve the extraordinary. Following are brief descriptions of my approach and highlights of my experiences:

Funding and Entrepreneurial Efforts

Approach: Strive for financial health and the ability for self-determination by selectively securing a diversity of mission-focused revenues that generate surpluses.

Experience

- Led efforts to secure approximately \$25 million in support of various capital projects of nonprofit organizations
- Oversaw efforts resulting in the acquisition of human service contracts with City, State and Federal agencies valued at tens of millions of dollars
- Oversaw efforts resulting in the securing of foundation grants for a broad range of purposes valued at several millions of dollars
- Catalyzed or played lead role in planning for: college access programs; programs for children with special needs; a health and fitness center; wellness programs for seniors; a food coop

Government Affairs

Approach: Advocate aggressively and diplomatically with government officials, individually and, when appropriate, in coalition, for resources and policies that enable the fulfillment of nonprofit missions.

Experience

- Represented dozens of human service agencies to City, State and Federal government
- Lobbied successfully for capital funds in excess of \$20 million from City and State government (this amount is included in the description of capital funds secured above)
- Led numerous advocacy coalitions achieving results including: creation of English-as-a-Second language programs; reinstatement of funds for after-school programs; revisions to the City's contracting regulations and practices; renewal ("base-lining") of City funds; improvements to home-delivered meals and homemaking programs
- Developed deep links with advocacy, umbrella and membership organizations
- Led and moderated rallies, press events and forums for political candidates

Strategic Planning

Approach: Identify the core, articulate mission and vision, deepen areas of strength and thoroughly assess environmental conditions – all with a view to making a lasting and remarkable contribution.

Experience

- Played lead role in development and implementation of Educational Alliance Strategic Plan that achieved results including: a clearer mission; a rationalized programmatic portfolio; an upgraded marketing function; a new visual identity; and a stronger and more diverse Board of Directors
- Following an Educational Alliance Strategic Plan decision that certain sizable programs could be better operated by other organizations, led efforts, involving complex relationships with government and real estate considerations, to withdraw from these programs
- Oversaw market research, competitive analysis and demographic analysis
- Fostered a culture of strategic thinking at Educational Alliance beyond implementation of

the Strategic Plan, including interviews, focus groups, visioning and ongoing deliberations about long-term programmatic planning

Employment Highlights

Educational Alliance	Senior Vice President, External Affairs
14 th Street Y	Interim Executive Director
UJA-Federation of New York	Director of Public Policy and Planning
Brooklyn Bureau of Community Service	Director of Planning and Development
Queens Library	Public Relations Officer
NYC Parks and Recreation	Director of Public Affairs, Flushing Meadows Park; Press Officer

Nicole T. Sebastian

Deputy Executive Director, Volunteer Consulting Group

Ms. Sebastian is the Deputy Executive Director of VCG Governance Matters, a nonprofit organization whose mission focuses on strengthening nonprofit organizations by improving the governing and management ability of their boards of directors. Nicole has over 15 years of professional experience in the nonprofit and corporate sectors. Prior to joining VCG, she was a Senior Associate with the CEO and Board Practice at Heidrick & Struggles, a leading global executive search firm. In this capacity, she primarily worked to build the boards of Fortune 500 companies, and also worked on several marquis CEO and CFO searches.

She was previously the Manager of Governance at the Robin Hood Foundation, where she was responsible for the board development, recruitment and governance education needs of Robin Hood's grant recipients. Prior she was a Program Director at the French-American Chamber of Commerce. She has also worked as a freelance consultant, helping several nonprofit organizations and foundations in New York with their strategic and operating plans. In addition, she has conducted policy research for UNICEF on the prevention of trafficking, served a tour with the UNDP in Costa Rica, and worked for Saint-Gobain Desjonquères, a French glass manufacturer.

Nicole holds a Master's degree in Public Administration from Columbia University with a concentration in nonprofit management and a BA in English and French literature from SUNY Geneseo. She is fluent in English, Spanish and French. She is a founding member of the Young Professionals Committee of Susan G. Komen for the Cure, a Board member of the Women's Executive Circle of New York (WECNY), and a long-time member of the Grantmakers Committee of VCG Governance Matters. She has also served as an Adjunct Professor at Columbia University, teaching a graduate-level Strategic Management course.

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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***National Customized Services, Nonprofit Finance Fund (NFF)***

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.

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.

Farra Trompeter
Vice President, Big Duck

Farra has more than 15 years of experience in communications and fundraising for nonprofit organizations. Farra's expertise focuses on helping nonprofits use the internet (social media, websites, email, etc.) to increase visibility and connect with donors, activists, and other stakeholders.

Farra is an active participant on the Communications Committee for the New York City Anti-Violence Project and helps organize 501TechNYC—a monthly meetup for local members and friends of the Nonprofit Technology Network (NTEN). Farra is a part-time faculty member at Milano The New School for Management and Urban Policy, where she teaches a class about Online Engagement for Nonprofits. She also holds an M.S. degree in nonprofit management from The New School.

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.

