



YOUR MONEY OR YOUR MISSION?
Wednesday to Saturday, September 26 to 29, 2007.
Sheraton National Hotel, Arlington, Virginia.

NCNE and its partners* are delighted to present its next national conference, "**Your Money or Your Mission?**" We have organized the event around three main themes:

- **Securing resources:** how can a nonprofit decide which of the many sources of support available are most likely to provide it with the resources it needs if it is to make the greatest impact in terms of its mission? And what combinations of sources will work best? Within this theme, we will also explore the dynamic relationships between nonprofits and business.
- **Planning:** how can a nonprofit allocate its resources to achieve its greatest impact? What approaches to strategic and business planning are most likely to be effective for different types of nonprofit?
- **Managing Strategic Risk:** how can a nonprofit identify the likely effect and probability of risks that will threaten its ability to achieve its greatest impact?

We are very excited about the line-up of presenters we have for this conference. They will challenge participants with new information, concepts, and insights, and provide direct help in the form of tools and frameworks for direct application in the nonprofit workplace. We believe you will benefit a number of ways if you attend:

Nonprofit Leaders and Managers will receive new information and insights that can help them maintain or increase the impact of their nonprofits; they will also be able to leave the conference with some tools and frameworks, for example for developing an income strategy and for developing strategic and business plans for their nonprofits.

Consultants that support nonprofits can explore new concepts and frameworks that help them improve their clients' capacity; and they can use the tools and frameworks provided to support clients to improve their income and formulate strategic and business plans, and more.

Funders will identify ways in which they can help their grantees to enhance their sustainability and therefore the ways in which they can invest wisely in the capacity of these grantees.

Academics and students of nonprofits can inform their work by exploring the research and ideas presented by colleagues at the conference and hearing the experiences of those who work in and with nonprofits to improve their sustainability.

Business people can contribute to and learn new ways of enhancing the impact of their work with nonprofits.

We do hope that you will take the opportunity to come and enjoy this stimulating program. And for those who want to make a long weekend of it, we have timed the event so that you can take advantage of the sights of Washington, DC and Virginia's countryside and history. We look forward to seeing you in September!

With best wishes,

Russ Cargo Ph.D.
Board Chair

Dennis Young Ph.D.
President

Richard Brewster
Executive Director

*NCNE's partners in the conference are the School of Policy Studies at Georgia State University, the Institute for Policy and Governance, Virginia Tech and the Center on Nonprofits and Philanthropy.



YOUR MONEY OR YOUR MISSION?

The Conference Program

We provide here the schedule of all the sessions that are confirmed so far and a description of each. Biographies and pictures of most of the speakers can be found after this schedule.

The conference program comprises three elements. Each of these elements is designed to present new ways of thinking about these topics, and to identify the practical implications of these ways of thinking for nonprofit board members and managers:

- ☑ **Plenary presentations**, in which the ideas of academics and other experts in the given topic will be commented on and discussed by the whole conference.
- ☑ **Seminars**, in which research and other work-in-progress is shared with smaller groups in breakout sessions. Nonprofit leaders, consultants, funders and businesspeople will respond and, with participants, capture how this thinking can be exploited to improve nonprofit sustainability.
- ☑ **Masterclasses**, whose purpose will be to provide tools and frameworks based on new thinking that nonprofit leaders can take away and apply to their own organizations to enhance their ability to sustain their impact.

There are links between some of the sessions. For example, there are a Seminar and a Masterclass on Income Strategy, and two sessions on the role of nonprofit boards. However, each session is designed to stand alone. All the sessions will take place in the same area of the Sheraton National, so it will be relatively easy to transfer from one to another.

Enjoy, whichever combination you choose.

Richard Brewster

NCNE Executive Director and Conference Organizer

Wednesday 26 September: 4:00 p.m. onwards
Registration opens
Evening:Registration and dine arounds
Thursday 27 September 08:45 to 10:15: First Session
<p><u>Opening Plenary. Your Money or Your Mission?</u></p> <p>We open the conference with a story of economic leadership. <u>Ken Gladish</u>, who was president and CEO of the YMCA, will tell the story of the challenges and successes he and the “Y” experienced during his tenure there, and share his reflections on the lessons they learned.</p> <p><u>Dennis Young Ph.D.</u>, President and founding CEO of the National Center on Nonprofit Enterprise will then introduce a framework for achieving Sustainability through Economic Leadership, and the place in this of Financing Nonprofits (including relations between Businesses and Nonprofits,) Planning, and Managing Risk.</p>
10:15 to10:45: Break

10:45 to 12:15 Second Session: Parallel Breakouts

Seminar I *Financing Nonprofits*

Knowing the Unknown? What can we say about nonprofit income?

Good strategic thinking about a nonprofit's income strategy requires some knowledge of the sources of dollars and other forms of support that are available. Information about nonprofit revenue streams is notoriously unclear, and data is only collected under the most general headings. This session attempts to fill some of the gaps on the canvas.

- ✓ **Janelle Kerlin**, from Georgia State University will present the results of her research on 20 year trends in different types of revenues, and **William Foster** of the Bridgespan Group will talk about the fascinating work he's been doing to try and get behind the Internal Revenue Service data to see how nonprofits grow. They both have some surprising conclusions.

Masterclass I *Financing Nonprofits*

Sustainability Tools

Through much of this conference presenters and participants will be talking generically about nonprofits. We thought it would be interesting to look at some tools and frameworks that have been developed with nonprofits that work in particular fields in mind, but that have general application.

- ✓ **Rakhi Kasat** and **Tim Jones** of The US Environmental Protection Agency, Office of Wetlands, Oceans, and Watersheds will explore some tools including an on-line module on how to develop a finance plan and a priority-setting tool to help organizations establish priority objectives.
- ✓ **Barbara Langford** of The Finance Project will present thinking that has evolved from the experiences of the Project and its many partner nonprofits engaged in youth services. These practical lessons have been captured in the Sustainability Planning Workbook.

Seminar II: *Managing Risk*

Strategic Risk Management by Nonprofits

How do nonprofit boards and managers decide how much risk to take when making a strategic change like setting up a new venture, expanding or reducing a program, selecting a new leader or entering into a collaboration?

- ✓ **Dennis Young Ph.D** explores some different ways of thinking about strategic risk and **Karen Dale**, VP Operations and Strategic Development at Volunteers of America tells the fascinating story of how Volunteers of America is seeking to encourage greater risk-taking in the pursuit of much greater mission impact.

Seminar III : *Financing Nonprofits*

Free Time? Volunteers as a strategic economic resource

Most nonprofits only have volunteers. Volunteer time is a resource that distinguishes nonprofits from other types of organization. A key dilemma for nonprofits that try and "manage" these resources, is how to engage volunteers efficiently while enhancing the spirit of engagement and giving.

- ✓ **Jeff Brudney** of Cleveland State University and one of the leading authorities on volunteering in the US will present a session whose centerpiece will be a presentation by **Bob Grimm**, Director of Research and Policy Development at the Corporation of National and Community Service, on trends in volunteering in America's cities. An **Executive Director** from a nonprofit that enjoys substantial contributions of time from volunteers will share her organization's experience.

12:15 to 14:00: Lunch Break

Luncheon Masterclass. **Strategy Formation: Beyond Strategic Planning. La Piana Associates.**

Nonprofits are increasingly urged to create a strategic plan. But how do organizations actually develop strategy and take strategic opportunities? This foundation funded, four year long, project is reaching its final stages and

La Piana Associates will report on the tools they have developed and tested extensively with nonprofits in different parts of the US.

14:00 to 15:30: Third Session: Parallel Breakouts

Seminar IV *Financing Nonprofits*

Economic Literacy: a board imperative

It is a given that a principal responsibility of a nonprofit board is to oversee its finances. How many boards understand the underlying economic structure of their organization and what precisely do they need to know in order to ensure that sufficient resources of the right kind are found to deliver its mission?

- ✓ **David Renz**, of the University of Missouri Kansas City will lead the first of two sessions devoted to board issues. **Rodney Christopher** of the Nonprofit Finance Fund will explore "capital structure" and how important it is that the board understands this, and a nonprofit that has introduced a commercial venture will illustrate the need for this awareness.

Seminar V *Financing Nonprofits*

Managing on Medicaid?

Most US nonprofits rely heavily on government funding, and many spend time and energy on trying to reduce their dependence on these sources. But what exactly are the problems, and what about the benefits? Very little research has been conducted on how exactly government funding affects nonprofits.

- ✓ **Courtney Burke** of the Rockefeller Institute will present new research on the flows of the \$100 billion of Medicaid money to nonprofits and the implications for their management. **A nonprofit** that receives significant amounts of Medicaid funding will share experience of the realities and how this compares to other sources, both public and private. **Alan Abramson**, Director of the Nonprofit Sector Research Fund at the Aspen Institute, that funded this research, will lead the session.

Seminar VI *Nonprofit Planning*

Life is what happens while you are making other plans.

Most nonprofit leaders strive to plan and many nonprofits work to a strategic or business plan. So often, however, there seems to be a disconnect between the plan and what actually happens. What are the underlying concepts and techniques that make a plan more likely to be beneficial? What can we learn from the experience of nonprofits in their attempts to develop and deliver plans?

- ✓ **Kevin Kearns** of the University of Pittsburgh will frame this session on the challenges of planning. **Jeanne Bell** of Compasspoint will provide insights from her work supporting large numbers of nonprofits to plan, and a Nonprofit ED will tell her story of the ups and downs of creating and then following a plan. The panel will identify pointers to how a nonprofit can achieve greater impact as the return on the investment of their time, effort and emotions in planning.

Seminar VII: *Financing Nonprofits*

The complex business of Membership Dues

Many nonprofits, particularly associations, rely on membership dues. Very little of the data about nonprofit dues are accurate, and membership income is more complicated than other sources of revenue - it includes a distinctive element, donations to help other members. How can a nonprofit set dues in a way that maximizes money and mission? For this session, we are delighted to work in partnership with ASAE.

- ✓ **Richard Steinberg**, author of the chapter on new thinking about Membership Dues in NCNE's "Financing Nonprofits" will share the theory that explains membership dues and explore a spreadsheet model that provides a practical way of structuring dues. **Melody Jordan-Carr**, Director of Member Relations at ASAE will share their experience and that of their many Association members in structuring and marketing dues so that both impact and sustainability are enhanced.

15:30 to 16:00

Break

16:00 to 17:30 Fourth Session: Plenary presentation

Nonprofits and Business: A New World of Innovation and Adaptation.

Nonprofit statisticians often point out that the contributions of corporations to nonprofits in the US constitute a very small proportion (less than 5%) of nonprofit income. However, the impact of business thinking on nonprofits (the pressure to be more "businesslike,") the increasing use of market mechanisms to achieve social change and the entrance of for-profits into arenas previously dominated by nonprofits like day care have created dynamic and rapidly changing relationships between the sectors. The title of this session is also the title of a forthcoming book to be published by the Urban Institute, one of NCNE's partners in this conference.

- ✓ **Professor Joe Cordes** of George Washington University and his fellow authors will provide a preview of the thinking and main lessons of the research and analysis that has gone into this publication. They will draw out the practical implications of this for nonprofits and the session will provide a living example of collaboration between a nonprofit and a business.

Elizabeth Boris, the director of the Center on Nonprofits and Philanthropy at the Urban Institute, will chair the session.

18:00 to 19:00 Reception and Second Keynote: **John Castellani, President of the Business Roundtable.**

Most of the presenters at this conference are part of or connected with, the nonprofit sector in the US. **Mr Castellani**, who represents businesses with combined annual revenues of \$4.5 trillion, will provide an outsider's perspective on the sector, on how it operates and on what nonprofits and business can learn from each other..and what they cannot.

Evening:

Dine Arounds

Friday 28th September

07:30 to 08:30: Breakfast and Introduction of program for the day.

08:30 to 10:00 Fifth Session: Plenary Presentation

Capital Matters

Sam Walton said "Capital isn't scarce, vision is." Many nonprofits would beg to differ. Most do a good job in often difficult circumstances of raising the money they need for day-to-day operations. However, when it comes to finding the money to invest in the management of the organization, in important changes in program, or in growth, vision is often plentiful but capital in short supply.

- ✓ **Trinita Logue**, President and CEO of IFF (Illinois Facilities Fund,) will lead this session. A nonprofit leader will tell the story of the opportunities and the pitfalls he has encountered in growing his organization, and Trinita will capture the lessons to be learned. **Rachel Moser Williams** of the Aspen Institute will offer a more radical perspective on the possibility of changing the legal form of your organization in order to access more investment.

10:00 to 10:30

Break

10:30 to 12:00 Sixth Session: Parallel breakouts

Seminar VIII *Financing Nonprofits*

The Nonprofit Income Jigsaw I

Why do nonprofits have different sources of income? Many organizations, while operating in the same field, have different principal sources of revenue and other forms of support and different combinations of income streams. How can a nonprofit know which sources of support are most likely to be rewarding in its own case?

- ✓ Building on work over the last three or four years that has culminated in the publication by NCNE of "Financing Nonprofits: Putting Theory into Practice," Dennis Young Ph.D. explains his new theory that the key to unlocking a nonprofit's income potential can be found in the nature of its mission and program activities. Dennis will lay out the theory and debate this with participants in the seminar. (This session can be "paired" with Masterclass III from 1:45 p.m. to 3:15 p.m.)

Masterclass II: *Nonprofit Planning*

The CNE and NCNE Nonprofit Business Planning Project: Planning Tools

Planning models used by nonprofits are essentially for-profit models adapted, sometimes well, sometimes not, for nonprofit organizations. They generally fail to take account of what is different about nonprofits: difficult to measure outcomes and a wide range of different sources of support. Through this Kellogg Foundation funded project, the Center for Nonprofit Excellence in Akron, Ohio and NCNE, advised by a number of nonprofit experts from across the US, have developed tools (and guidance on how to use these,) that begin to address these issues.

- ✓ Richard Brewster, Executive Director of NCNE will lead participants through the use of these tools using a worked example and examples from participants' own experience. Those attending the seminar will be able to take away with them templates and worksheets, a guide to their use and a glossary of the most commonly used planning concepts and frameworks.

Seminar IX: *Financing Nonprofits*

Partnership: the only way forward, or a costly illusion?

Collaboration has been all the rage, particularly in the minds of funders of nonprofits. Nonprofits face a bewildering array of opportunities to collaborate and an often equally powerful set of forces that favor independent action. How can a nonprofit's leaders know when the benefits of collaboration will outweigh the costs?

- ✓ Renee Irvin of the University of Oregon, author of a chapter on Barter and Collaboration in "Financing Nonprofits," will present some concepts and a framework for thinking about these kinds of decisions. Alyson Parham of the Partec Group will draw on her deep experience of community alliances involving nonprofits. Tom Triplett of the Fieldstone Alliance will review the practical issues entailed in pursuing the wide range of options for collaboration between nonprofits and businesses. Renee Irvin will then point up the practical lessons and the steps that nonprofits should take to ensure effective collaboration.

Seminar X: *Managing Risk*

Nothing Risky, Nothing Gained

Peter Drucker said: "People who don't take risks make about two big mistakes a year. People who do take risks make about two big mistakes a year." The question for a nonprofit, like any other organization, is: "How do we make it more likely that the risks we take will pay off?"

- ✓ Melanie Herman, Executive Director and inspiration of the Nonprofit Risk Management Center, will lead this session off by laying out a framework for the systematic management of risk. Professor Martin Grace, of Georgia State University, will explore how approaches to managing risk in other industries can help nonprofits approach risky decisions. The session will then hear a story of an organization that helps other nonprofits manage a particular type of risk: Jane Levikow, of the Tides Center in San Francisco will explain the Center's role in providing Fiscal Sponsorship as a service.

12:00 to 13:45 Lunch Break: NCNE's Institutional Consortium Students to report back on their view of conference and on their view of issues critical to sector's economic health.

13:45 to 15:15 Third Session Parallel breakouts

Masterclass III: *Financing Nonprofits*

The Nonprofit Income Jigsaw II

Building on the thinking that Dennis Young will be sharing in Seminar VIII, NCNE has developed and conducted initial tests on a practical approach that can help a nonprofit increase and/or stabilize its income. This Masterclass provides an opportunity for nonprofits and nonprofit consultants to test the relevance of this approach to their work and become part of a larger research project into effective income generation.

- ✓ **Richard Brewster** and **Dennis Young**, both of NCNE, will use templates and worksheets to guide participants through a worked example of the development of an income strategy. This exercise will help them learn how to use these materials effectively within their organizations or with their clients. Participants will be able to take these frameworks and worksheets away with them.

Seminar XI: *Financing Nonprofits*

Social Enterprise, should we or shouldn't we?: the Neverending Story

Nonprofits have generated resources by earning income for centuries. However, starting in the late '80s, and during the last 10 years in particular, there has been considerable enthusiasm for earned income as a means through which smaller and medium-sized organizations can transform their sustainability. Recently, there has been some pushback, with claims that commercial ventures in nonprofits rarely make money and are a costly distraction. There is very little objective research to prove the point either way. This session is intended to begin to fill that gap.

- ✓ **Kris Prendergast** The new President and CEO of the Social Enterprise Alliance will moderate a panel that features **Dr. Neil Kleiman** of SEEDCO in NYC, who will present SEEDCO's new research report on Limits to Social Enterprise; and **Jennifer Wade-Berg** of the University of Colorado who will share her substantial research of into the effects of commercial activity on the health of nonprofits.

Seminar XII: *Managing Risk*

Dear Prudence

The role of the Board in strategic and prudent risk-taking in a nonprofit is insufficiently understood. How should the board define risk? What risks should be its concern, and which should be the preserve of staff? What kind of information should a board require in order to make sensible decisions about given types of risk, and how can it make those decisions?

- ✓ **David Renz**, of the University of Missouri Kansas City, will present this second session on the role of the board. He will present some ideas that can help board members and the staff supporting them to "frame" decision-making about risks at board level. **Evelyn Brody**, of Chicago-Kent College of Law, will explore the legal dimensions of risk-taking by a nonprofit board. And a **Nonprofit Executive Director** will tell the story of how he worked with his board to develop a balanced approach to decision-making about taking risks.

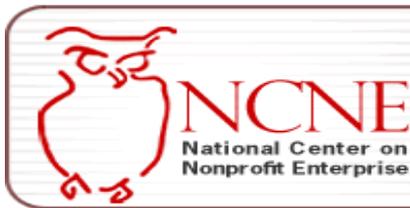
15:15 to 15:45 Break

15:45 to 17:15 Fourth Session: Final Plenary Discussion

Your Money or Your Mission? : Managing the realities.

How can we capture all the insights and lessons shared at this conference? And are we sure that we have grasped all realities faced by those who seek to make their nonprofits more sustainable?

- ✓ **Russell Taylor**, CEO of National Arts Strategies, will lead a session that has two main features. First, a senior nonprofit leader will tell the story of spectacular and event for growth in his nonprofit. Using this as a springboard, Taylor will engage a *panel of four of the experts* who have addressed the conference in identifying the most useful lessons that conference participants can take away, reflect on and use.



Helping
Nonprofits make
wise economic
decisions

CONFERENCE ROSTER OF SPEAKERS AND PRESENTERS

We are very excited about the line-up of eminent, talented and experienced people who have agreed to contribute to our event. Here are pictures and bios of most of them, in the order in which they are presenting at the conference. The others will be added as we receive them.



Dennis R. Young Ph.D holds the Bernard B. and Eugenia A. Ramsey Chair of Private Enterprise in the Andrew Young School of Policy Studies. He is also president and founding CEO of the National Center on Nonprofit Enterprise. A former President of the Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA), Dr. Young recently received this organization's Award for Distinguished Achievement and Leadership in Nonprofit and Voluntary Action Research. Dr. Young has written and edited many books, including *Financing Nonprofits: Putting Theory into Practice* and *Wise Decision Making in Uncertain Times: Using Nonprofit Resources Effectively*. He has been named to the *NonProfit Times*

"Power and Influence Top 50" list.



Janelle Kerlin is an Assistant Professor in the Andrew Young School of Policy Studies. Dr. Kerlin conducts research on politics and policy related to nonprofit development and operation often from an international perspective. Her present areas of interest include social enterprise and international nonprofit organizations. She is currently editing the book *Social Enterprise: A Global Comparison*, which compares social enterprise in seven regions of the world. She is also heading up research on trends in nonprofit commercial activity in the United States. She holds an M.S. in social work from Columbia University and a

Ph.D. in political science from the Maxwell School at Syracuse University.



William Foster is a partner in the Boston office of the Bridgespan Group. He works with direct service organizations and philanthropic foundations on expansion strategy, reorganization efforts, and advocacy initiatives. His clients have been education reform, youth services, community health, and aging-related organizations, including major national affiliate-based networks. He is the co-author of the Harvard Business Review article, "*Should Nonprofits Seek Profits?*" and the recent Stanford Social Innovation

review article, "*How Nonprofits Get Really Big.*" William earned his undergraduate degree in Social Studies from Harvard College and his MBA from Stanford University.



Rakhi Lasat is an Oak Ridge Institute for Science and Education (ORISE) fellow for the Sustainable Watershed Finance Team at the Environmental Protection Agency. She helps coordinate and promote the team's projects and products to watershed groups around the country. Rakhi earned a MS in Resource Ecology and Management at the University of Michigan and a BA in Anthropology and Environmental Studies at Washington University. Combining her interest in clean water systems with a passion for outreach, she hopes to continue to work to make watershed organizations more sustainable long-term.



Timothy Jones has provided environmental finance training to community-based watershed organizations and solid waste managers for over 10 years with the U.S. Environmental Protection Agency's (EPA) Offices of Wetlands, Oceans, and Watersheds and Solid Waste. Tim provided soil conservation training to farmers and environmental education training to elementary school teachers for over five years as a Peace Corps Volunteer in Chile and St. Vincent and the Grenadines. Tim earned a B.A. in Environmental Studies from St. Lawrence University and an M.A. in Sociology from Washington State University.

Barbara Langford is Associate Director for Tools, Technical Assistance and Training at the Finance Project, a national organization that helps nonprofits develop solid financing plans and strategies to sustain their programs. Ms. Langford is responsible for the development of an array of technical assistance tools and resources on financing and sustaining initiatives serving children, families, and communities, as well as for providing and coordinating direct technical assistance for policy makers, community leaders, and program developers seeking to finance and sustain promising state, local, and community initiatives. Ms. Langford holds a master's degree in Public Policy from the Kennedy School of Government at Harvard University.



Karen Dale is Executive Vice President of Operations and Strategic Development at Volunteers of America, Inc. Ms. Dale's role is to lead and strategically manage the long-term care division, affordable housing development and management, program services, and real estate development. Her position also serves as the liaison to the 38 local offices to provide tailored technical assistance. Previously, Ms. Dale served as the Chief Executive Officer for Greater Southeast Community Hospital, Hadley Memorial Hospital and Skilled Nursing Facility, and DC General Ambulatory and Emergency Care Centers. In addition, she was the Chief Operating Officer for the D.C. Healthcare Alliance at Chartered Health Plan, Inc. She is an active member of the American Nurses Association and is a trained leadership facilitator.



Jeff Brudney Ph.D. holds the Albert A. Levin Chair of Urban Studies and Public Service at Cleveland State University's Maxine Goodman Levin College of Urban Affairs. He is the author of widely used publications on volunteer management and was one of the lead researchers for *Volunteer Management Capacity (Urban Institute 2004)*, the first nationally representative study ever undertaken on the status, practices, and prospects of volunteer management in charities and religious congregations in the United States. He received his B.A. degree at the University of California - Berkeley, and his M.A. and Ph.D. degrees at the University of Michigan - Ann Arbor. Dr. Brudney is a leading authority on volunteering.



David Renz is the Beth K. Smith/Missouri Chair in Nonprofit Leadership and the Director of the Midwest Center for Nonprofit Leadership, in the Department of Public Affairs in the Henry W. Bloch School of Business and Public Administration at the University of Missouri-Kansas City. David teaches and conducts research on nonprofit and public service governance, leadership and management and has worked extensively with boards and leaders in nonprofits. He has written or co-authored nearly 100 articles, chapters and reports for both scholarly and practice-oriented publications, including *Nonprofit Management and Leadership*, *Public Administration Review* and *Nonprofit and Voluntary Sector Quarterly*. David has a Ph.D. in Organization Theory and Administration from the University of Minnesota.



Rodney Christopher is Vice President, Special Projects at the Nonprofit Finance Fund. He is responsible for a range of activities at NFF nationally. Previously, he oversaw all aspects of Advisory Services. Mr. Christopher was on staff from 1992 to 1996, and returned to NFF in 2001 to manage the Nonprofit Recovery Fund, which raised and distributed over \$10 million to help New York City nonprofits recover financially from the economic effects of September 11th. He has served on many boards, including of the Brooklyn Arts Exchange, Gay Men of African Descent, and the New York Technical Assistance Providers Network. He has a BA summa cum laude in Social Sciences from Simon's Rock College of Bard and an MS in Urban Policy Analysis and Management from New School University.



Courtney Burke is a senior research scientist at the Rockefeller Institute of Government, the public policy research arm of the State University of New York. Her research focuses on health policy issues related to health insurance and Medicaid. She has also written about nonprofit organizations' dependence on Medicaid funding and the effects of the state fiscal crises on nonprofits. Prior to joining the Institute, Ms. Burke worked at the New York State Department of Health and at the New York State Office of Advocate for Persons with Disabilities as the senior policy analyst. She has a Master of Science in Health Policy and Management from the School of Public Health, University at Albany and B.A. in Political Science and Journalism from the University of Connecticut.



Kevin Kearns is Professor of Public and Nonprofit Management in the Graduate School of Public and International Affairs (GSPIA), University of Pittsburgh. Kevin has served as President of The Forbes Funds, an organization devoted to capacity-building in nonprofit organizations. He has published on nonprofit accountability, strategic planning, board development, and general management. His book, *Private Sector Strategies for Public Sector Success* (Jossey-Bass, Inc.) was honored with the Terry McAdam Best Book Award by the Alliance for Nonprofit Management. He holds a bachelors degree from the University of Dayton and masters and doctoral degrees from the University of Pittsburgh.



Jeanne Bell, MNA is Executive Director of CompassPoint Nonprofit Services, one of the country's leading providers of training and consulting services to community-based organizations. She is the co-author of *Financial Leadership for Nonprofit Executives: Guiding Your Organization to Long Term Success* (Wilder). In addition to frequent speaking and consulting on nonprofit strategy and finance, Jeanne has conducted a series of research projects on nonprofit executive leadership, including *Daring to Lead 2006: A National Study of Nonprofit Executive Leadership* and *Securing the Safety Net: A Profile of Community Clinic and Health Center Leadership in California*. Jeanne serves on the Advisory Boards of the Institute for Nonprofit Organization Management at the University of San Francisco and The Nonprofit Quarterly.



Richard Steinberg is Professor of Economics, Philanthropic Studies, and Public Affairs at IUPUI, where he serves as Associate Director for the Center on Philanthropy Panel Study of Giving and Volunteering (COPPS). He is the co-author of *Economics for Nonprofit Managers* (with Dennis Young), the editor of *The Economics of Nonprofit Institutions* (2004), and co-editor of *The Nonprofit Sector: A Research Handbook, Second Ed.* (2006, with Walter Powell). He has served as co-President of the Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA), and as a member of the Aspen Institute's Nonprofit Sector Research Fund's Governing Council.



Melody A. Jordan-Carr is Director of Member Relations of the American Society of Association Executives (ASAE) and The Center for Association Leadership. ASAE & The Center have over 22,000 members serving associations in the U.S., Canada and worldwide. She has delivered membership development initiatives that range from directing a comprehensive membership marketing program for membership recruitment to membership dues restructuring. In addition, she serves as the section liaison for ASAE & The Center's membership section council. Jordan-Carr has also worked with the National League of Cities and the ASAE Foundation.



Joseph Cordes is Professor of Economics in the Department of Economics at George Washington University, and the Director of the Ph.D. Program in Public Policy, and Advisor in the Policy Analysis and Research Track of the Master of Public Policy Program. Professor Cordes has also held a number of appointments in the U.S. Department of the Treasury and the Congressional Budget Office and has been a Visiting Fellow at the Urban Institute. Prof. Cordes has co-edited two books, and has authored or co-authored over fifty articles and chapters on a wide range of subjects, including taxation and tax policy, economic evaluation of public expenditure programs and the economics of the nonprofit sector. He received the M.S. and Ph.D. in Economics from The University of Wisconsin, Madison in 1977.

Keynote Speaker:



John J. Castellani is President of Business Roundtable, an association of chief executive officers of leading U.S. corporations with a combined workforce of more than 10 million employees and \$4.5 trillion in annual revenues. Castellani has led the Roundtable's efforts on key public policy issues ranging from trade expansion to civil justice reform to fiscal policy. He is a member of the so-called "Gang of Six" most influential lobbyists, as cited by Bloomberg. The Roundtable organizes the Partnership for Disaster Relief to improve the flow of private sector resources, services and staff following a major disaster. Castellani is called frequently by the news media for comment on business and public policy issues, and has appeared on such programs as NBC's "Meet the Press" and PBS' "The NewsHour with Jim Lehrer."



Trinita Logue is the founding president and chief executive officer of the Illinois Facilities Fund (IFF), a statewide, community development financial institution. Logue conceptualized and created the IFF and it is recognized nationally as a leader in the development of innovative financial and real estate solutions for nonprofit organizations that serve low income communities. IFF's assets have grown to \$55 million and its staff provides below-market financing and a range of consultative services to nonprofits throughout Illinois. Logue is a member of Northwestern University's Kellogg School of Management Public and Nonprofit Advisory Committee, a director and member of the Executive Committee of the Donors Forum of Chicago and a member of the Governor's Leadership Sub-cabinet on Children, Youth and Families.



Richard Brewster is the Executive Director of the National Center on Nonprofit Enterprise (NCNE.) For eight years until February 2003, he was chief executive of Scope, a UK disability charity with revenues of \$160 million and 4000 employees. As CEO, he oversaw major changes in governance and in the strategy of the organization. He is a Senior Visiting Research Fellow at the Open University Business School, and has been Senior Visiting Practitioner at the Center of Public and Nonprofit Leadership at Georgetown University. Richard Brewster was educated at Oxford University and the Open University, worked for 10 years in commercial management in ICI, a multinational chemical company. He joined the nonprofit sector in 1986 when he became the National Appeals Director of Oxfam, a major UK NGO.



Renee Irvin is Associate Professor of Planning, Public Policy and Management, as well as Director of the Graduate Certificate in Not-for-Profit Management and Coordinator of Finance and Operations for the School of Architecture and Allied Arts at the University of Oregon. Her current research focuses on the reactions of donors to financial distress in nonprofit organizations. Prior research includes regional wealth distribution and philanthropic capacity mapping, the role of private philanthropy in regional government finance, regulation of nonprofit organizations and economic modeling of community foundation formation and growth. Irvin has written extensively on nonprofit issues and authored the chapter on Barter and collaboration in NCNE's "Financing Nonprofits." She obtained her Ph.D. in Economics from the University of Washington.



Tom Triplett is a Principal consultant with the Fieldstone Alliance, based in Minnesota. Tom focuses on the financial restructuring of nonprofits and social sector systems with an emphasis on revenue streams. He also consults on strategy development and business planning. Tom is an Executive Fellow and Adjunct Faculty member of the College of Business of the University of St. Thomas and serves on several nonprofit boards. Tom has been Policy Advisor to the Mayor of Saint Paul, Interim President of the St. Paul Convention and Visitors Bureau, President of the College of Visual Arts, Executive Director of the Minnesota Business Partnership, Deputy Counsel to the Minnesota Attorney General, Commissioner of three Minnesota state agencies and an attorney with two of the Twin Cities' largest law firms. He is a graduate of Grinnell College and the Duke University School of Law.



Melanie L. Herman is Executive Director of the Nonprofit Risk Management Center. The Center provides training, technical assistance and informational resources to help nonprofits take a practical approach to managing risk so that they can fulfill their missions and stay out of trouble. A prolific author of a more than a dozen comprehensive (and comprehensible!) guides on various risk management topics, Melanie has delivered countless workshops, seminars, and keynote presentations for organizations simply unwilling to leave success to chance. Melanie earned a Bachelor of Arts Degree in Urban Affairs from American University (Washington, DC) and a Juris Doctor from George Mason University (Arlington, VA). She is a member of the District of Columbia Bar Association.



Neil Kleiman is Vice President for Policy, Research and Communications at Seedco and is currently establishing the new Seedco Policy Center. In addition to issuing policy reports on social enterprise, planned publications include an assessment of the linkage between workforce and economic development and the role of employee benefits to low-wage workers. He is also assisting a coalition of forty national and local foundations in New York explore a new set of public private partnerships in the area of workforce development. Neil's work has been featured in the *New York Times*, *Wall Street Journal*, the *Chronicle of Higher Education*, the *Chronicle of Philanthropy* and *USA Today*. He has taught Urban Politics at Barnard and John Jay College and holds a Ph.D. in Political Science from the Graduate Center of the City University of New York.



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Kris Prendergast is President and CEO of the Social Enterprise Alliance, the leading association building stronger, more effective nonprofits through advancing earned income strategies. Prior to joining SEA in February 2007, Kris served as Vice President for Governance and Organization Development at the U.S. Green Building Council. During her tenure the USGBC grew from 300 to 7200 members with a self-sustaining, multi-million dollar budget. Kris also initiated and led the Council's chapter program, which grew to include 50 local chapters and 8 regional councils. Kris has a M.A. in Environmental Studies from Vermont College and an interest in sociocracy, a system of governance that offers radical new strategies for optimizing communications and decision-making within organizations.



Evelyn Brody is a professor of law at Chicago-Kent College of Law, Illinois Institute of Technology, and is the Reporter of the American Law Institute's *Principles of the Law of Nonprofit Organizations*. Evelyn has written extensively about nonprofits and the law. She wrote chapters on "Accountability and Public Trust," for Lester Salamon's *State of Nonprofit America* (2002,) and on "The Legal Framework for Nonprofit Organizations" for the second edition of *The Nonprofit Sector: A Research Handbook*, edited by Walter W. Powell and Richard Steinberg (2006.) Most recently she has authored "Business Activities of Nonprofit Organizations: Legal Boundary Problems," in *Nonprofits and Business: A New World of Innovation and Adaptation* (C. Eugene Steuerle and Joseph Cordes, eds., forthcoming). Evelyn is a member of the Expert Advisory Group of the Panel on the Nonprofit Sector. She earned her J.D. (*magna cum laude*) from Georgetown University Law Center in 1981, and her B.A. from Yale College in 1976.



Russell Willis Taylor is President and CEO of National Arts Strategies. She has served as director of development for the Chicago Museum of Contemporary Art, established the English National Opera's first fund raising department, and from 1997 through 2000, she was the ENO's executive director. She also lectured extensively at graduate programs of arts and business management throughout Britain. She received the Garrett award for an outstanding contribution to the arts in Britain, the only American to be recognized in this way. Currently serving on the advisory boards of the National Center on Nonprofit Enterprise, The University Musical Society of the University of Michigan, the 21st Century Trust, and the Virginia Center for Nonprofit Excellence, Mrs. Taylor is a Fellow of the Royal Society of Arts.

