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Massachusetts Nonprofit Network

2022 MNN ANNUAL CONFERENCE

Celebrating Inspiration, Education, and Connection

October 19

DCU Center

In Person!

WORKSHOP DESCRIPTIONS

Workshops will take place in 3 blocks throughout the day. In Blocks 2 & 3, you will have the option of attending an Expert Roundtable in addition to the traditional workshop offerings. This new format will allow interactive group discussion with an expert in your field of interest.

BLOCK 1 10:45-11:45 AM

Activating Corporate Volunteers in a Post-Covid World

Volunteering is evolving rapidly. The global pandemic, racial justice movement and a greater desire for social responsibility among younger employees have meant big challenges to traditional corporate volunteerism models. But in this change, the seed of creativity and empowerment are taking place. Companies and nonprofit organizations alike are adapting with new approaches and ideas.

This workshop highlights how nonprofit organizations are adapting to the new landscape. It will cover evolving needs and expectations of companies, trends and innovations among nonprofit organizations and clear and actionable stops nonprofit organizations of any size can take to rethink and redesign their volunteerism programs based on the new reality.

Rich Maiore,
Rocket Social Impact

Rich is President of Rocket Social Impact, a Boston based, national social impact consulting and communication agency. He is a recognized social impact leader having worked the past 25 years working with companies and nonprofit organizations to achieve better business and greater good through strategic social impact. His agency focuses solely on helping companies and nonprofits develop, implement, and communicate their philanthropic, programmatic and volunteerism efforts. He is also an adjunct professor at Johns Hopkins University, teaching a course in Sports Philanthropy.

Back to Basics: Nonprofit Finance 101

New to the nonprofit world, or just want a refresher on best practices? We're going back to the basics! Please join Harriet Cutshall of Your Part-Time Controller, LLC (YPTC) for an overview of the basic financial statement terminology, reporting, and governance best practices that all nonprofit leaders should know.

Harriet Cutshall,
Your Part-Time Controller, LLC

Harriet "Hatsy" Cutshall, CPA, holds a BS in Biology from the College of William and Mary and a certificate in Accounting from UVA. Her experience includes serving as Director of Finance and Administration for the Rural Community Assistance Partnership, and as CFO for the American Society of Appraisers for America Abroad Media. These experiences honed her strong accounting, management, budgeting, and communication skills.

In her position as Senior Manager with Your Part-Time Controller LLC, she supports the work of her colleagues and their clients as an advisor as well as a hands-on practitioner, when needed.

Conversation, not Presentation: Get Your Donors Talking and Raise More Money!!

The downfall of the typical Case for Support is that it promotes presentation, not conversation. The solicitor talks a lot. The donor listens. That's the opposite of what we want! The visual, one page Donor Conversation Driver provides even less experiences solicitors with the framework they need to have productive donor conversations. Customizable and flexible, the Conversation Driver works equally well for in-person and Zoom donor visits. This visual tool combined with a handful of key questions will get the donor talking about what is important to them broadly and in the context of your nonprofit. It also addresses the question every donor is wondering: What are you going to do with my money? It makes clear what the funding plan is, with the donor's permission, including examples of impact, and leads the solicitor naturally into an "ask."

Diane Remin,
MajorDonors.com

Named a top 25 fundraising consultant by Philanthropy Media in 2016, Diane G. Remin, MBA, is the President of MajorDonors.com. An acclaimed consultant and trainer, she founded MajorDonors.com twelve years ago to help nonprofits with limited resources boost their revenues, with an eye toward major gifts.

Dimensions of Diversity

The world we live in is a composite of many cultures, values, and ways of interacting with one another. Dimensions of Diversity can include gender, religious beliefs, race, marital status, ethnicity, parental status, age, education, physical and mental ability, income, sexual orientation, occupation, language, geographic location, and many other components. The session is based on a model to help people understand how group-based differences contribute to people's social identities. These dimensions of diversity are essential in people's lives and influence interaction styles and experiences.

This workshop is designed to increase our cultural competence and understanding of these diversity factors, facilitate bridge-building, encourage understanding, and provide opportunities to expand our understanding of diversity, inclusion, and equity.

Saleha Walsh,
Insource Services, Inc.

As Vice President, Saleha applies her HR expertise in client communication and contextual decision-making to managing Insource's operations and addressing client needs. Saleha works as part of the executive team to co-lead the delivery of Insource's professional services to its clients and founded Insource's HR Consulting Practice. She is jointly responsible for the overall management of client success for Insource's consulting services and business development. Saleha serves on the Board of the Charles River Regional Chamber as well as the DEI employer Committee for CRRC and NE/SAE. Saleha holds a B.A. in English from Merrimack College.

Shavon Andrews,
Insource Services, Inc.

Shavon is a passionate leader on the HR team, who uses her 20+ years of experience in HR and DEI work to help Insources' clients achieve further success. Known for her action-oriented determination to build respectful relationships, Shavon supports multiple clients with their HR management needs. As a DEI and racial equity facilitator, Shavon has experience partnering with government agencies, organization, and academic institutions, businesses, faith-based initiatives, and communities seeking to advance their mission by promoting DEI values for the benefit and development of their workforce and communities served. Shavon has a Bachelor of Biological Science from the University of Pittsburgh.

Inclusive Strategies for Supervisors or Peers to Support Employees with Diverse Abilities

If your non-profit business or organization has committed to hiring a diverse workforce, this session is for you. Inclusion is not about proximity, or simply providing a work opportunity for someone with a disability. Inclusion is the intentional work we do to ensure that everyone is welcomed, engaged and supported to be successful in their roles. We will explore top inclusion strategies that will give your team the tools and confidence to create a culture of inclusion ensuring that persons with diverse abilities are valued (and equal) members of your team.

In this interactive training, attendees will learn about disability etiquette, suggested terminology and best practice around inclusion strategies. End the session reviewing inclusion scenarios in small groups and apply the strategies learned to solve them. You'll leave knowing that Inclusion means FOR ALL and is achieved when there is organizational commitment.

Lisa Drennan, MERGE Diverse Abilities Inclusion Consulting	Lisa has a 38-year career supporting individuals with disabilities to be engaged within their community. At NE Village in Pembroke, MA, she gained experience in working as a Direct Support Worker and as the Director of The Sollar Wellness Center specifically designed for this population. In 2014, she joined the South Shore YMCA as the first-ever Association Director of Inclusion, creating innovative programs and comprehensive staff training to build a culture of inclusion. In 2018 Lisa started MERGE Inclusion Consulting where she provides consultation, staff training and systems implementation to community entities committed to inclusion of persons with disabilities.

Nice to Meet You Madam Governor: Positioning Your Nonprofit for a New Era on Beacon Hill

In January Massachusetts will welcome a new Governor and Lieutenant Governor to the State House for the first time since 2015. Pundits and pollsters have written about the historic nature of this race, all focusing on one major theme: change. A new administration means new faces and minds on capital hill and more importantly new policy priorities, initiatives and budget proposals - all of which affect you and your nonprofit. The new year will also bring new statewide officeholders like a new Attorney General, State Auditor, and maybe a new Secretary of State. January will also mark the start of a new legislative session with numerous new House and Senate members and movement within the legislature following leadership appointments.

Drawing from the experiences of two lobbyists with nearly 40 years of combined experience lobbying exclusively for the nonprofit sector and a prominent nonprofit leader who previously served as a senior member of the Patrick Administration and transition team, this interactive workshop will help you position your organization, its mission, and any policy objectives for this exciting period.

Lily Mendez, Mass Mentoring Partnership	Lily Mendez brings more than 25 years of senior leadership experience in the nonprofit, government and philanthropic sectors. Prior to her appointment as President and CEO of Mass Mentoring Partnership, she served in the MA DOT as Deputy Secretary for Interagency and Reform. At the agency she led the Office of Transition Management which was responsible for monitoring the merger of the Commonwealth's transportation agencies. She also served as the Senior Director of Appointments and Civic Engagement for Governor Patrick responsible for advising him on the selection of individuals to serve on over 700 boards, commissions, and Gubernatorial leadership appointments.
Charles Glick, Charles Group Consulting	Charles Glick is a seasoned lobbyist with nearly 30 years of experience in advocacy, politics, and community relations. He has successfully lobbied on some of the most controversial issues facing Massachusetts. Prior to forming Charles Group Consulting in 2001, Charles served as Director of Government Affairs for the Jewish Community Relations Council. Through CGC, he has helped his nonprofit clients secure millions of dollars in public funding and pass groundbreaking legislation. He holds an MPP from the Kennedy School of Government at Harvard, a Masters in Communal Service from Brandeis University, and a B.A. in Political Science from UCLA.
Kate Worrall, Charles Group Consulting	Kate Worrall serves as CGC's Vice President. She joined the CGC team in 2012, and brought to the position a diverse background in grassroots and direct lobbying at the state and federal level, law and public policy advocacy, and public relations. Kate provides strategic government affairs advice to clients and legislators alike, advocating to advance CGC's clients' agendas. She has been instrumental in passing major legislation and securing millions of dollars in state budget and more recently ARPA funding for the non-profits she advises.

Planning for Continuity in an Era of Staff, Leadership, and Board Transitions

Planned and unplanned absences and turnover are a reality most nonprofits face these days. This places a higher premium on retaining staff and planning for business continuity and succession. This workshop will explore strategies nonprofits are using to retain staff, develop backup capabilities, and, when they occur, capitalize on transitions as opportunities for individual and organizational growth. Some topics will include: Developing a skills inventory; Cross-training and building the capacity of the team; Retention strategies for staff and leadership; Fostering Diversity, Equity, inclusion and Belonging; Planning for inevitable turnover; Preparing the organization for leadership transitions; Challenges of following long-time leaders and how to overcome them; When to consider interim leadership and who should fill the role and; Strategies for ensuring Board leadership continuity.

David Harris, Interim Executive Solutions	David has extensive experience working with for-profit and nonprofit organizations to develop and implement strategies to improve operations, marketing, board governance, and leadership team effectiveness. He served as co-chair of Community Action Partners where he provided strategic planning, marketing and other services to Boston area nonprofits. In that capacity David led projects with nine different organizations. Most recently he served as the Interim Executive Director of the Springfield Empowerment Zone in western Massachusetts and the Landing School in Maine. David is currently President of the HBS Association of Boston and Clerk of YouthBuild Boston.
Sarah Bingman-Schott, Interim Executive Solutions	Sarah Bingman Schott has over 35 years of experience in both nonprofit and for-profit companies, most notably in the marketing of start-ups and turnarounds. She was also a resource development officer in higher education. Since college, she has been serving on the boards of nonprofits in the Boston area, including two organizations where she served as board president. She is also a pro bono nonprofit consultant with CCT Boston and is currently an interim Executive Director and Partner with Interim Executive Solutions. She holds an MBA in Finance from Columbia University and a BS in Chemical Engineering from MIT.
Patrice Keegan, Interim Executive Solutions	Patrice Keegan has been a senior leader at nonprofits that improve the health and well-being of individuals and communities for 35+ years. Key roles have included Executive Director at Boston Cares; and, at Codman Square Health Center, Director of the CivicHealth Institute and Director of Administration and Finance. She is currently an Interim Executive Director and has served on numerous Boards including Points of Light, Friday Night Supper Program, Friends of 20 Arlington Street and Fenway Community Health Center. Patrice holds an MPA from Harvard's Kennedy School of Government and an ALB in Extension Studies cum laude from Harvard University.

BLOCK 2 1:15-2:15 PM

Building LGBTQ+ Affirming Workplaces

There are millions of LGBTQ+ adults in the US Workforce. As a colleague, supervisor, or leader, you have the power to proactively support this sector of the working population through individual, interpersonal, and institutional best practices. Learn how to implement policies that affirm and support LGBTQ+ workers and retain and develop the tremendous amount of talent and diversity within this employee base.

This training will cover basic LGBTQ+ identities, best active allyship/co-conspirator practices, and resources to better ally with the LCBTQ+ community members by speaking up, speaking out, and proactively honoring and respecting the myriad of ways that people identify within the LGBTQ+ community.

René Rives,
Greater Boston PFLAG

René is grateful to be a part of the GBPFLAG team and is excited to continue to combine their 15 years of experience in youth work, education, and public health to support educators, community organizations, companies, and communities of faith in partnering with LGBTQ+ populations to meet their needs and challenge oppressive systems. René graduated from Lesley University with a B.S. in Liberal Studies with a concentration in Expressive Arts Therapy. The ocean, chosen family, and their two cats are essential parts of their self-care that help sustain them in doing the work.

Kavi Kaushik,
Greater Boston PFLAG

Kavi Kaushik is honored to bring their facilitation experiences, nonprofit background, and love for trans communities to conversations about LGBTQ+ affirmation and support. They graduated with a B.A. in biology and women, gender and sexuality studies and have since worked in public health education and outreach, youth facilitation, and legislative and community advocacy. They are also a Commonwealth Corps/Massachusetts Service Alliance Alumnus. Kavi is passionate about youth-led programs, imagining possibilities outside of the criminal legal system, and art as a means of self-care.

Improve Your Grant Grant Writing: 10 Easy Steps

This interactive workshop will focus on 10 easy steps to improve your organization's Grants Program. Sarah Andrews from Andrews Consulting is a fundraising specialist and growth strategist with a solid history of securing 5 & 6 figure grants on behalf of New England based nonprofit clients.

Learn about all the pre-application prep work that goes into securing a grant including foundation research, relationship building and stewardship. Get actionable steps on breaking down the application planning process, timelines, data collection and reporting. Review the information required on most grant applications and Sarah's tips for sharing impact and outcomes. You will leave with new ideas, best practices and resources for developing or expanding your organization's Grants Program.

Sarah Andrews,
Andrews Consulting LLC

Sarah Andrews is a fundraising specialist and growth strategist with 20 years of senior management and development experience in human services and higher education. Her extensive fundraising experience includes achieving aggressive fundraising goals, organizational capacity building, annual campaigns, engagement and stewardship programs, strategic growth planning, sponsorship and promotions, grant writing, and major giving programs. Sarah is a native of Manchester, NH who enjoys spending time with her family, strong coffee, live music and being outside.

Investing in Nonprofit Technology: Promise, Peril & Impact

Open-source, cloud-based digital technologies are transforming how effective nonprofits are engaging with stakeholders and delivering programs and services. Using tech well increases staff capabilities, improves outcomes, enhances organizational resilience, and fuels growth opportunities. Mis-steps on the digital technology journey also can lead to wasted resources, staff stress, low morale, and discontented clients, funders, volunteers and donors.

In this session, you will learn: A strategy for developing your organization's digital roadmap that can build on evolving technology; Why organizing around processes and workflows is the starting point for success- not tech selection; How you can help your staff balance and pace the day-to-day work with the time and learning needed to implement new technology; How to budget for technology investment and annual expenses

Case studies will be presented to help workshop attendees move concepts to actionable ideas.

Rob Leighton,
iMission Institute Inc.

Rob Leighton is the founder and executive director of the iMission Institute. Entering its second decade, iMission is a strategic digital marketing and technology consulting firm working exclusively with nonprofit and public sector organizations. Clients include human service agencies, associations, community foundations, educational institutions and healthcare organizations. Rob received a Bachelor's degree from the University of Michigan and Masters In Business Administration from the Yale School of Management. He is the proud husband and father of confident, caring and successful women.

Prep Your Whole Team to Speak with Passion and Purpose

Everyone involved in your organization is an ambassador. So everyone, from the staff to the board level, needs to be able to tell at least a part of your organization's story in a way that inspires interest. In comes "the elevator speech," not a jargony statement about the fact that your organization is a 501(c)(3), but a passionate conveyance of your mission with a call to action. Your message should build trust in the organization within the time span of an elevator ride, approximately 30 to 90 seconds.

Phyllis Corkum,
Philanthropy Massachusetts

Phyllis Corkum joined Philanthropy Massachusetts in 2021 to build out the Nonprofit Partners Program. Having served as a leader in both the philanthropic and nonprofit communities, Phyllis brought with her a keen understanding of how funders and development professionals work with and perceive one another. Early in her career, Phyllis directed a mobile adult education program incubated by a United Way, where she later directed fund distribution then fund development. She has since directed multiple development efforts for organizations at the local to national levels. Most recently, she served as the grants manager for a leading private foundation in Florida.

Reimagining the Individual Donor Experience Through an Equity Lens

The donor landscape is changing. Donors are more socially, racially, and economically diverse than ever before, requiring strategies, systems, and structures that can accommodate that diversity and celebrate it. In this workshop, learn how your nonprofit can ensure effectiveness in securing and retaining individual gifts from any passionate donor by creating inclusive prospecting, cultivation, engagement and solicitation strategies. Facilitator Alyssa Wright dives into several case studies from her time creating these donor communities across several development mechanisms, including capital campaigns and crowdfunding.

Alyssa Wright ,
Wright Collective

Alyssa Wright is a self-identified Millennial, speaker, and consultant that began her career as a human rights artist and activist in Belgrade, Serbia. She has raised over $60 million for social change and worked for over a decade in international philanthropy with hundreds of global philanthropists and organizations from East Africa to North America. Wright works hard to shift cultural perspectives in philanthropy and inspire people to believe that change is possible no matter what. A regular contributor to Forbes, Global Giving, and Network for Good, Wright is a sought-after speaker and facilitator.

The Two Magic Words of Communication: “Yes, and…”

As improviser Tina Fey said, "Just say yes, and you'll figure it out afterwards." Learn improvisation's masterful tool of "Yes, and..." and some tricks of the trade to lead and collaborate with more groupmind, joy, and ease. Through entertaining lessons and impactful improv-enriched interactive exercises, professional improviser Pam Victor shares valuable techniques to work with more positivity and true cooperation in order to increase staff empowerment, conflict-resolution skills, and productive team spirit. Get fun, hands-on experience with how to use a “Yes, and…” mindset to promote more inclusive brainstorming sessions, innovative thinking, and creative problem solving. (Plus, you'll have so much fun you'll forget it's work.)

Pam Victor,
Happier Valley Comedy

Pam Victor wears a lot of hats: professional improviser, facilitator, happiness coach, author, teacher, and the Head of Happiness (aka founder and president) of Happier Valley Comedy, the first and only improv theater and training program in Western Massachusetts. Pam is a recipient of the 2019 New England Public Radio Arts & Humanities Award and a TEDx speaker. She is the author of “Baj and the Word Launcher: A Space-Aged Asperger Adventure in Communication” and co-author of “Improvisation at the Speed of Life: The TJ & Dave Book.” Pam is a nice person. She likes you already.

EXPERT ROUNDTABLES BLOCK 2

Advocacy -	Brian Condron, In-House Alternatives
Communications -	Jim Fisk, Causeworks
Development -	Alex McCray, Philanthropy Massachusetts
Development -	Elizabeth Manchester, Partridge Snow & Hahn LLP
Diversity, Equity, & Inclusion-	Amy Hogarth, Wayside Youth and Family Support Network
Leadership -	Melissa Pond, Melissa J. Pond LLC

BLOCK 3 2:30-3:30 PM

All Fundraising is Grassroots Fundraising: Lessons from the Field

What called you to join your organization? Why do you care about the mission, and why should I? The most effective fundraising strategies I know, I know from grassroots organizing; and soon you will too!

This workshop will share lessons drawn from grassroots community organizing to help you develop a personal and effective approach to fundraising, whatever your organizations' mission or size. We will identify specific lessons, discuss how they relate to fundraising and work together to apply them. You will develop the beginnings of your own individual approach to fundraising so when you leave the room, you can go anywhere.

Jaclyn Miller-Barbarow,
EV Kids

Jaclyn Miller-Barbarow believes fundraising and philanthropy are powerful ways to build the beloved community. She is currently the Director of Giving at EVkids. A development generalist, Jaclyn has more than a decade of experience running the full development cycle. Jaclyn is a Certified Fundraising Executive (CFRE) with an MA in Nonprofit Organizations from the University of Georgia with a BA in Religious Studies from Emory University. Jaclyn lives in Hyde Park with her partner Abraham, their toddler, and their baby. Jaclyn has been known to make a logical model in lieu of new year's resolutions.

Culturally Competent Supervision: Create Groundwork for Growth

Overview of Core Competencies for Executing Culturally Sensitive Supervision and Training by Dr. Ken Hardy.

Review 20 Principles to support Cultural Competent Supervision such as: Be a broker of permission to give voice to previously silenced topics: Grant the ability to speak the unspeakable: Find safety and comfort to risk saying things that you have previously been unable to say.

Introducing dimensions of diversity early in the training process particularly validate and acknowledge the lived experiences of members of diverse backgrounds. Turn mis-steps into steady steps.

Amy Hogarth,
Wayside Youth & Family
Support Network

Amy Hogarth (She/Her/Hers) is Wayside's Directory of Agency Training and Equity Culture. She has been at Wayside as clinician, director, and advocate in residential programs. Amy currently co-leads Wayside's Diversity, Equity, and Inclusion Initiative.

Daniela Thermora,
Wayside Youth & Family
Support Network

Daniela (She/Her/Hers) is the Director of People and Career for Wayside Youth and Family Support Network and provides outpatient therapy to children and adolescents. Daniela started as an in-home therapist and outpatient clinician where she dedicated her expertise in cultural and ethinic considerations to help Latino families. She has led initiatives around diversity, equity, and inclusion, and is most interested in having courageous conversations about our societies mental health, inequalities, racism, sexism, and diverse cultures. Daniela speaks fluent Spanish and lives in Framingham with her high school sweetheart husband and three biracial daughters, surrounded by food, books and music!

Data Breaches and Ransomware: How You and Your Organization can Sleep Better at Night

Data breaches and ransomware continue to make the headlines, and for good reason; the hackers continue to get bolder every day in their attacks. Organizations and individuals are targets and the ramifications can be significant. This presentation will review the latest trends in cybersecurity and what they mean to your organizations and its people.

Attendees will learn the latest business processes and management techniques to put their organization on better footing against the current threat landscape.

David Sun, CLA	David is a principal with Clifton Larson Allen LLp and leads the cyber incident response and forensics practice. He has 25 years of experience in all aspects of cyber security. Past accomplishments include conducting security assessments for the United Nations and various United States Federal Reserve Banks, security integration for the 2004 Olympic Games in Athens and providing expert testimony for Secretary of State Hillary Clinton's email server controversy. David routinely assists clients with ransomware attacks, email compromise, wire fraud, and post-breach remediation. He utilizes his experience to help clients create effective cybersecurity programs to improve date and systems security.
Francis Nemia, CLA	Frank leads CLA's IT Risk and Cybersecurity practice. He works with clients to understand the risks that may impact their business strategy, processes systems, external environment and organizational culture. HIs experience includes assisting clients assess their current and potential IT cyber risks and develop complementary solutions to minimize and mitigate their exposures. He has worked with clients in designing and testing their internal controls and IT Cybersecutiy infrastructure for the Not-For-Profit Industry. Frank is an adjunct professor at Boston College and is an active board member on a number of Not-for-Profit Organizations.

Effective, Affordable, and Current Day Methods for Communication to Stakeholders

With multiple platforms available for communicating to stakeholders, this workshop will focus on building an affordable strategy that best fits the audience being engaged. Covering topics such as translation, social media, email blasts, and more.

Attendees will leave with easy tips and techniques to improve their internal and external communications.

Shayla Caso, For Kids Only Afterschool Inc	Shayla Caso holds a background in Early Childhood Education, and a degree in Communications from Salem State University. She has a passion for equity and inclusion and has taken on leadership roles in multiple committees dedicated to this work, past and present. Shayla's daily work includes: social media postings on multiple platforms, daily communications via email, texting, and physical hand-outs to staff, over 1,000 families of over a dozen race/ethinies, a Board of Directors, Funders, partners, and more.
Niki Preston, For Kids Only Afterschool Inc	Nicole joined For Kids Only Afterschool in 2020, bringing with her an education background of a Bachelors in Health Science Studies and a Master in Management. Professionally, in conjunction with working for a decade as a project manager, Nicole's expertise includes working with children in a variety of roles, including a counselor-in-training, group leader, and site director. Additionally, Nicole has first-hand experience in afterschool through her attendance at For Kids Only throughout her childhood. In her daily work, Nicole manages over 50 grant awards, multiple community partnerships, and oversees the marketing and communication department at For Kids Only Afterschool.

Evaluation Simplified

Evaluation is essential for nonprofits to inform program design, learn more about those we are serving, and attract and retain funding. Funders' expectations for evaluation are increasing, but many organizations struggle to adequately and meaningfully measure impact. Many of us do not have evaluation experts on staff, and engaging outside evaluators is cost prohibitive. Also, embarking on a long term study requires time and resources. Even simple client surveys can be difficult to administer and may not yield an adequate response. However, there are creative ways to measure progress and gather client feedback with limited resources!

In this workshop, we will discuss the difference between outcomes and outputs, and how to ask the right questions to obtain the input you need to track progress toward goals. We will explore how evaluation can be implemented in simple and cost-effective ways, such as on-the-spot surveys, easy-to-collect outputs, and using existing research to provide evidence of programmatic impact. The workshop will also discuss evaluation through an equity lens and how to collect information from people served in a respectful way.

Christine Guarino, Pear Associates	Christine Guarino is a mission-driven professional with over 15 years of experience helping to build resources within nonprofit organizations. Christine currently works as a consultant with Pear Associates, a firm dedicated to helping nonprofit organizations become more fruitful. Christine has expertise in grant writing and development, and helps clients with needs assessments, strategic planning, and program design. Christine's previous experience includes seven years as the Director of Institutional Giving at Jewish Family and Children's Service. Prior to that, she worked in executive search at Lindauer Global, and as a grant writer for The Guidance Center and Riverside Community Care.

Understanding Financial Data for Non-Finance Professionals

Board members, Chief Executive Officers, Directors, and other key organizational leadership bring a variety of talents and expertise to an organization or association, but they do not always have extensive experience with finance and accounting matters. How can we both understand and then communicate the essential financial information we and they need to know to effectively manage and serve an organization?

Organization management and governing board members cannot properly perform their duties if they do not obtain and understand information about the organization's financial position. They can neither make informed decisions about goals and planning nor monitor the organization's progress towards those goals, leaving them unable to fulfill their fiduciary responsibilities.

Elizabeth Stasiowski, Insource Services, Inc.	Serving as a Director of Finance for over a decade, Elizabeth uses her extensive experience to keep clients on track financially, up-to-date with regulatory requirements and compliance issues and looking forward to create long-term financial stability. Her background includes grant management, Government Auditing Standards, OMB Circular A-133 compliance and UFR preparation. She holds a Bachelor of Arts degree in romance language (Spanish) from Boston College and a Master of Social Work from Boston University. She has also earned certificates in accounting, public purchasing and nonprofit management and leadership.
Stephanie Vaz, Insource Services, Inc.	As a Finance Team Lead, Stephanie provides a range of accounting and financial management services to our clients. She and her team assist clients with setup for new clients, general ledger management, billing, accounts receivable and accounts payable functions, company bank account reconciliations and financial reporting, analysis and budgeting. Stephanie applies the expertise gained through her work as a former auditor with nonprofits and other businesses to manage the technicalities of keeping the books, so clients can focus on their mission. Stephanie has an MBA from the University of Phoenix and a Bachelor's degree in Accounting from Atlantic Union College.

EXPERT ROUNDTABLES BLOCK 3

Advocacy -	Charles Glick, Charles Group Consulting
Development -	Laurie Herrick, Rainmaker
Diversity, Equity, & Inclusion -	Soudie Tahmassebipour, Re-Envision Consulting
Leadership -	Eric Curtis, Curtis Strategy
Leadership -	Aubrey Henderson, Cradles to Crayons Massachusetts
Technology/ Systems -	Keven Truhler, CliftonLarsonAllen