



2023 MNN Conference Workshops

Advocating for Equality and Justice to Achieve Long-term Social Progress

In the nonprofit sector, advocacy is critical in driving long-term social progress. This workshop will delve deeper into the subject, discussing various types of advocacy that nonprofits can use, the essential skills and knowledge required to be an effective advocate, and the challenges and opportunities of advocacy work. We will also explore the significance of building relationships and coalitions while learning how to use social media and other tools to amplify our voices.

Presented by Keila Torres, Conexiones Latinx-MA

Allyship in The Workplace 101

Looking for ways to be more inclusive of LGBTQIA+ identities in the workplace? Want to better understand the experience of marginalized identities in the workplace? Allow Greater Boston PFLAG to be your teacher in becoming an effective ally and friend to LGBTQIA+ people! The program will feature topics such as: communication strategies, pronoun use, identity and expression. Our skilled Trainer will guide you through misinformation to truth, and our Speaker's story will feature the unique perspective of queer identity. Join us in creating inclusive community at work for all identities!

Presented by: Kathryn Zoggetti and Diane Gorman, Greater Boston PFLAG

Building an Endowment Fund: Legacy Giving for Small Nonprofits

Endowment Fund dollars are difficult to raise directly unless an endowment component is tied to an upcoming capital campaign. But the campaign solution is "of the campaign moment." The enduring approach is to launch a legacy giving (aka planned giving) program.

This workshop will teach smaller nonprofits why and how to launch a bequest and beneficiary-based legacy gift program. Bequests alone generate 68% of all legacy gifts--no technical expertise required!

Learn how to develop a legacy program that requires a modest investment of resources- and again, no technical expertise. What you do need is patience and persistence. It can take 5-7 years for the first gifts to start arriving--which is why so many smaller nonprofits miss this opportunity. However, if you continue to promote the program, those first gifts will be the beginning of a revenue stream that can be used to create or expand an endowment fund.

The workshop will provide everything a nonprofit needs to launch a legacy program and start down the path of building a robust Endowment Fund.

Presented by: Diane Remin, MajorDonors

Cliff Effect Pilot: Removing Structural Barriers to Family Economic Prosperity

Imagine: a job promotion offering higher income and a chance for a better life. However while contemplating it, you discover that the increased earnings will disqualify you from essential public benefits that currently support your basic needs. This dilemma, known as the "Cliff Effect," forces choosing career growth or vital assistance, further entrenching the cycle of poverty.

This is common for individuals receiving public assistance through programs like SNAP, WIC, and Section 8. The welfare system exacerbates the Cliff Effect, limiting eligibility and failing to account for economic realities and job opportunities.

Women's Money Matters as a part of the Massachusetts Economic Pathways Coalition has championed an innovative approach, resulting in the passage of "Act Concerning Public Assistance for Working Families and the Creation of a Pilot Program to Address the Impacts of the Cliff Effect." This legislation has paved the way for a pilot program that aims to eliminate the Cliff Effect by providing supplemental cash payments to offset lost benefits as individuals cross the eligibility threshold.

Embedding comprehensive supports into the reimagined benefits program, the pilot aims to empower families to overcome the Cliff Effect and achieve economic prosperity.

Presented by: Danielle Piskadlo, Women's Money Matters

Crafting Stories: The Art of Communicating with Data

This workshop is designed to empower participants with the necessary skills and knowledge to leverage the power of data as a persuasive and informative storytelling tool. By more effectively communicating data-driven stories, participants can ignite passion and inspire action, garnering greater support for their organization's mission, fostering stronger connections with key groups, and, ultimately, driving positive change in their communities.

First, participants will develop a strong foundation in data concepts and key terminologies, enabling participants to confidently navigate and interpret data. Then, participants will focus on how to effectively tell the story of their work using purposeful, meaningful data. Participants will receive guidance on best practices for transforming data into compelling narratives that resonate emotionally with their staff, donors, and the broader community.

Throughout this interactive workshop, participants will engage in a collaborative learning environment, drawing insights from real-life case examples and sharing experiences from their

respective organizations. Attendees will be encouraged to apply the knowledge and techniques to their own real-world challenges, ensuring practical and actionable takeaways. This hands-on approach fosters a deeper understanding of the concepts discussed and empowers participants to make immediate improvements in their data communication strategies.

Presented by: Luba Feigenberg, Reframe Evaluation

Create Your IT Roadmap - Tech for All Nonprofits

Technology can be daunting for nonprofit staff who traditionally face barriers to investing in digital planning. With an abundance mindset and strong strategic clarity, technology can help you create better working conditions for your team, advance your mission faster, and raise more resources to grow. Join Kristin as she reviews real scenarios nonprofits can use to take advantage of the tech trends of 2023. You don't need to invest large amounts of funds to make big leaps forward in technology. Let's talk about how to make your work better with tech!

Presented by: Kristin Leutz, Wright Collective

Demographic Data to Advance Equity

There is a heightened interest in demographic data – to gain visibility on equity, uplift BIPOC-led organizations, and increase investment in groups that reflect the communities they serve. This has led to duplicative data collection, placing an undue burden on the exact nonprofits for which the sector has pledged support. To reduce this burden and advance more data-driven decision making, Candid is partnering across the sector to encourage nonprofits that collect and share demographics to do so at no cost through GuideStar.

Join this workshop to hear from Candid and Demographics via Candid partner United Way of Massachusetts Bay (Philanthropy Massachusetts is also invited) to learn tips on how to get started with collecting demographics for your nonprofit.

Presented by: Cesar Del Valle, Candid

Demystifying Financial Statements

Don't like numbers? That's okay, but don't let a lack of financial savvy get in the way of reaching your professional potential.

You, too, can learn to read Financial Statements. The Balance Sheet, Income Statement, Budget versus Actual, the IRS Form 990... all of these are essential tools in understanding the health of an organization.

Before you interview for a position, wouldn't it be great to know if the organization can afford your salary? The IRS 990 can tell you.

Have you ever sat in a Board meeting and wondered what the Financial Statements are indicating about the organization as a whole or your division that has people shifting in their seats? You can be in the know and be prepared for the questions that might come your way.

What are donor-restricted funds and how do they impact your Net Income and Cash Flow? You will find answers here.

In 60 minutes, you will learn the types of financial statements, what information they provide, and (without a calculator) key datapoints that bring you “into the know” and help you to reach your professional potential.

Presented by: Kate Leahy, Charles River CFO

Effective Board Governance for the Executive Team: Empowering Senior Management

This workshop provides Massachusetts nonprofit executives a soup-to-nuts understanding of good nonprofit board governance. We will cover the role and significance of an organization’s Articles of Organization and By-laws for operation as a Massachusetts nonprofit and a federally tax-exempt organization; recruiting and maintaining board diversity; onboarding new board members; facilitating financial oversight; preparing for board meetings; and managing conflicts of interest. This presentation also addresses recent updates to state law regarding remote participation for nonprofit corporations with members and updates to Massachusetts Attorney General’s Guide for Board Members of Charitable Organizations.

Presented by: Eric Reustle and Elka Sachs, Krokidas & Bluestein LLP

Elevating the Mind: Strategies for Nonprofit Workplace Mental Wellness

Working in a nonprofit organization can be both great for the soul and taxing on a person’s health and wellbeing. Fundraising pressures; challenges of being understaffed, under resourced, and underpaid; and compassion fatigue can take a toll on our mental health. When nonprofit leaders cultivate a workplace culture that fosters optimal mental health, their organizations reap benefits such as improved productivity and safety, more consistent attendance, decreased disability costs, and - perhaps most importantly - positive morale and commitment to the organization’s success.

Workplace culture may start at the top, but it is influenced at every level in the organization. Each person in a supervisory position creates an environment that impacts others’ willingness to articulate concerns about their own or other employees’ mental wellness. People throughout an organization can advocate for policies and practices that support mental health and wellness. In this session, attendees gain information that they can use to implement mental health-friendly practices in their workplaces.

Presented by: Susan Weinstein, Families for Depression Awareness

Get into Action - Build A Culture of Philanthropy

Idealism can be perceived as frivolous. But, what if that is just what the naysayers say? What if idealism is about creating the funding breakthrough - and adequate resources - that you need for your organization's mission?

The idea of a Culture of Philanthropy has been around for years. Organizational leaders have seen it as ideal. What if the naysayers are wrong and it's actually possible to have all the resources you need to achieve your goals?

In this highly interactive workshop, dive into how you could get into action building a Culture of Philanthropy and an environment which fosters resource abundance. Laurie's body of work is now documented in her book, *Choose Abundance: Powerful Fundraising for Nonprofits – A Culture of Philanthropy*.

Learn what a Culture of Philanthropy is, what the common barriers are to achieving it, how you might break down those barriers, what others have done to find success, and what your next action steps are.

Building a Culture of Philanthropy is not a one-person-job. Studies have overwhelmingly shown that development staff, executive leaders and board members are the winning formula for an organization-wide Culture of Philanthropy. We strongly encourage teams to attend this workshop together!

Presented by: Laurie Herrick, Rainmaker Consulting

The Impact of AI on the Workforce: Is the Workforce Ready for this AI-driven Future?

Artificial intelligence (AI) is rapidly advancing and can replace specific jobs. As AI systems become increasingly sophisticated, they are poised to automate tasks and processes humans once performed. While this automation may bring about increased efficiency and productivity, it also raises concerns about the readiness of the workforce to adapt to this transformative change. In this workshop, we'll talk about how various jobs across different industries are at risk of being replaced by AI, explore whether the workforce is ready for this AI-driven future, and discuss how to prepare the workforce for the impact of AI.

Presented by: Rejoyce Owusu, Comprehensive Community Action Program

Practical Diversity, Equity, Inclusion, and Belonging (DEIB) Approaches to Talent Acquisition

The candidate market is challenging, and while we want to increase the diversity of candidate pools, it is overwhelming to think about where to begin. This session will provide tips to increase your diversity and ideas about how to strengthen your internal recruiting processes to increase your likelihood of success.

Presented by: Shavon Andrews and David Harrington, Insource Services, Inc.

Promise & Pitfalls: Navigating AI for Fundraising

With day-to-day operations and a plethora of tasks outside their core knowledge, many of us in the nonprofit space feel there is little time for critical fundraising efforts.

Generative AI tools, such as ChatGPT, have emerged as powerful solutions to streamline writing and communication tasks, offering immense potential to optimize fundraising strategies. However, these tools don't come without the risk of alienating donors and other stakeholders, privacy issues and ethical concerns. In this workshop, participants will be empowered to make informed decisions about integrating AI tools into their fundraising strategies, and how to do so in the most effective way.

Presented by: Anne Hager, Fundraising Levers

Resilience: Preparing Your Nonprofit for the Unplanned

The pressure on nonprofit leaders and boards continues to mount given competition for funding, increasing turnover at all levels, scrutiny of programs and heightened focus on social impact from for-profit organizations. Resilience is the key to surviving and thriving in this environment and this workshop will explore concrete strategic, operational, financial and leadership strategies nonprofit leaders and board members can and should implement to increase their organization's resilience to unplanned forces.

Presented by: David Harris, Interim Executive Solutions

Rise Up Cambridge - Cash Assistance for Families with Kids: A case study in building cross sector alliances

Collaboration is essential for communities seeking impactful change around seemingly intractable problems. No single actor can solve big issues. Combining the best capacities of the philanthropic, Nonprofit and Public sectors, a close collaboration came together around a guaranteed basic income pilot Cambridge RISE, giving \$500/month payments to 130 single caretaker households in Cambridge, which led to Rise Up Cambridge, a new cash assistance program serving over 2,000 families. Using a case study format, alliance partners -- Cambridge Community Foundation, Cambridge Economic Opportunity Committee (CEOC), and the City of Cambridge – will speak to the role each played in this process, sharing the challenges and opportunities, as well as the potential to shift poverty policies at the local, state, and federal levels.

Presented by: Geeta Pradhan, Cambridge Community Foundation

Trauma Informed Leadership

Being trauma informed is a necessary value for those of us that do human and community work. As leaders, it is our duty to ensure that we create a brave and safe environment wherever our work takes us. As the scale of work life balance continues to shift, those we lead rely on us to model the way. This workshop will provide an introduction to trauma and resilience as well as tangible tools to make an immediate impact for yourself and others.

Presented by: Alisha Rojas Harrison, Helen's House

Visual Communication: Thinking Beyond the Paragraph

Enhance your written communication skills with insights from graphic designers! This session will utilize the power of visual thinking, enabling you to present your written content in a more engaging, scannable, and accessible format for your audience. Learn straightforward text formatting techniques that will elevate the readability of your reports, presentations, briefs, and more.

Why is this important?

Finesse your ideas: These techniques help with communication and formulating your ideas in the first place. Pulling information out of paragraph form makes you more likely to see holes and inconsistencies in your content.

Make it easier on your audience: Your audience will be able to scan for main ideas and more easily identify parallel concepts, comparisons, and patterns to more quickly understand what you are trying to say.

Presented by: Emily Marsh and Malorie Landgreen, Colorbox Industries

Want to Change the World? Change Your Message!

"Sure, we can write a clear grant proposal, but explaining what we do to everyone else? That is a struggle." Sound familiar? If it does, you're not alone. It happens to almost everyone—especially leaders of nonprofit organizations. Outdated, ineffective, or even inaccurate messages plague most nonprofits from time to time. In this workshop, we will discuss the most common reasons why as well as, of course, how to fix and avoid them in the future. Concurrently, we will explore how a clear messaging strategy can help organizations stay focused on what they do best relative to what is needed most. We will use real-life stories from Massachusetts nonprofits such as Leading Cities, the Massachusetts Children's Alliance, the Massachusetts LGBT Chamber of Commerce, EdVestors, and more.

Presented by: Douglas Spencer, Spencer Brenneman, LLC

2023 MNN Conference Expert Roundtable Presenters

Závon Billups - MA Black and Latino Caucus

Závon was born and raised in Bridgeport, Connecticut. A graduate of Fairfield University, Závon obtained a degree in Politics, Philosophy, and Black studies; he was also the recipient of the St. Ignatius Loyola Medal, Fairfield's highest student achievement honor. Upon graduation, Závon spent several years as a teacher at a Boston middle school— where he developed their first ever Civics curriculum and authored curricular discourse that drew acclaim nation-wide. He is now the Executive Director of Massachusetts Black and Latino Legislative Caucus and a law student. He would describe himself as a Community Organizer, Wellness Strategist, Life-long Learner, and Friend.

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.

Bre Anna Clinkscales and Erin Roderiguez, Root Cause

Bre Anna Clinkscales is a Strategic Projects Associate at Root Cause. She graduated from Duke University. For her engagement in the Duke and Durham community, Bre Anna was awarded the 2022 Dr. Phail Wynn, Jr. Award for Leadership in Education recognizing individuals who demonstrate effective leadership in addressing systemic inequities.

Erin Rodriguez is the Executive Director of Root Cause. As Executive Director, Erin leads Root Cause with a focus on building and coaching a collaborative, caring team that works together to operationalize our values, employ our Principles of Engagement and deliver high quality projects.

David Crowley - DCI Social Capital Inc.

David Crowley founded SCI Social Capital Inc. in Woburn, his hometown, in 2002. Under his leadership, SCI has grown to serve communities across the Greater Boston region. Prior to SCI, David was the Executive Director of Boston-based Generations Inc. (now Literations). He has been involved in AmeriCorps since the program began in 2003, and served as the founding Director of the Kentucky Community Service Commission, which oversees the program for the state. David recently served as Steering Committee Chair for the CHNA 15 regional healthy communities network. David graduated from Harvard University with a degree in Government.

Eleanor Evans - Hemenway & Barnes LLP

Eleanor Evans is an attorney in the nonprofit group of Hemenway & Barnes LLP, where she provides practical advice to nonprofits of all sizes on strategic initiatives and day-to-day operations. She has over 20 years' experience representing nonprofit organizations in a range of legal, governance and compliance matters. Previously, Eleanor served as General Counsel of Action for Boston Community Development, Inc. (ABCD), a large nonprofit human services provider. She also served as Executive Director of Community Action Program Legal Services, Inc. (CAPLAW), a nonprofit that provides legal consultations and training to a national network of anti-poverty organizations.

Ellen Gugel -Grants & More

Ellen Gugel, GPC is an independent grants consultant with 20+ years' success in the world of grant funding. She's developed hundreds of successful proposals for dozens of community-based organizations. Organizations that improve communities and inspire, engage, and lift the lives of children and families; refugees and immigrants; people with disabilities; and others with basic needs, job training, education, environmental conservation, and arts and culture. She's worked with grassroots organizations to \$60M+ agencies. She earned her MBA from Boston University in Public and Nonprofit Management, and is a Grant Professional Certified, one of only a few hundred in the world.

Wyona Lynch McWhite - Arts Consulting Group

Wyona Lynch-McWhite (she/her/hers) joined ACG in 2016, bringing more than 21 years of experience leading art, university, and multidisciplinary museums. Her expertise includes executive search, museum planning, organizational assessments, strategic visioning, fundraising, and diversity training. Currently a Senior Vice President in the firm, she guides the IDEAS practice area helping organizations develop diversity plans, align organizational strategy with DEI goals, and facilitates DEI and team training to support organizational mission and strategic goals. She has worked as an Executive Search practice leader working to reduce bias in the hiring process and is a Certified Diversity Professional (CDP)

Henry Morris - Women's Lunch Place

Henry Morris has helped raise millions of dollars for local nonprofits in Houston, TX and now Boston, MA. In his current role, he manages public relations, marketing and communications, organic and paid social media, and grant writing for Women's Lunch Place, a daytime shelter and advocacy center for women experiencing homelessness, hunger, and poverty, which has been open in Boston's Back Bay for over 40 years. Prior to his nonprofit experience, Henry worked for two private advertising agencies in Memphis, TN. He graduated from Rhodes College in 2015 with a bachelor's in Philosophy.

Lucas Orwig and Consuela Greene, Root Cause

Lucas Orwig has over 15 years experience working at intersections of education, racial equity and social justice movement building, philanthropy, and non-profit management spaces, where he has focused on facilitating collaboration and shared leadership among those making decisions and those impacted by decisions. He supports clients to collect data and perspectives that will inform their Diversity, Equity, and Inclusion strategy development.

Consuela Greene has led strategic planning processes for individual non-profits large and small and for collective action work involving collaboration among several organizations. In North Carolina, she has supported the Every Baby Guilford coalition in developing a strategy to reduce racial inequities and health disparities in birth outcomes and helping partner organizations identify a shared purpose and develop concrete action steps to make progress.

Alyssa Rayman-Read - Hurwit & Associates

Drawing on her experience as an attorney and nonprofit executive, Alyssa specializes in workplace matters, helping clients resolve challenges and create thriving workplaces. Her practice includes workforce design, dispute resolution, investigations into misconduct, and trainings on LGBTQ+ inclusion and non-discrimination. Alyssa held leadership positions at Conservation Law Foundation and HEET, served as counsel for Northeastern University, and as a field attorney at the NLRB. Alyssa sits on the MA Commission on LGBTQ Youth and Beverly's Human Rights Committee and previously served on Greater Boston PFLAG's board. She holds degrees from Georgetown University Law School, Union Theological Seminary, and Swarthmore College.

Chris O'Shea and Ryan Ransford - Sentinel Benefits

Chris as an Employee Benefits Consultant at Sentinel Benefits & Financial Group. As an Employee Benefits Consultant, Chris consults and advises current and prospective clients on complex benefit programs, plan designs and compliance issues. Using his extensive human resource and insurance background, he is able to provide expert advice, develop solutions for current and future project plans, and execute strategies to consistently illustrate value for his clients.

Ryan joined Sentinel Group in 2011 as a Retirement Plan Advisor. As a Registered Representative of Sentinel Securities, Inc. and an Investment Advisor Representative of Sentinel Pension Advisors, Inc, Ryan advises both for-profit and not-for-profit organizations in the areas of fiduciary oversight and investment selection within retirement plans. Working directly with plan sponsors in helping them manage their fiduciary risk by implementing a fiduciary governance process while focusing on design, implementation, communication, and administration of qualified and non-qualified retirement plans.