

CONSULTING DAY FOR NEW YORK CITY'S NONPROFIT COMMUNITY

CONSULTANT BIOS

BaruchCOLLEGE
SCHOOL OF PUBLIC AFFAIRS 



**Baruch College
Newman Vertical Campus
Wednesday, March 23, 2016**

| | |
|----------------------------|-----------|
| Jillian Barsalou | 2 |
| Harry Berberian | 2 |
| John Braunstein | 3 |
| John Casey | 3 |
| Susan Chambre | 4 |
| Michael Davidson | 4 |
| Jane Englehardt | 4 |
| Fred Fields | 5 |
| Michael Feller | 5 |
| Linda Franciscovich | 6 |
| Phil Gartenberg | 7 |
| Rev. Alfred Gill | 7 |
| Hank Goldstein | 8 |
| Kathy Herre | 8 |
| Wayne Ho | 9 |
| Sonia Jarvis | 10 |
| Fiona Kanagasingam | 10 |
| Sandra A. Lamb | 10 |
| Peter Levinson | 11 |
| Shoba Nair | 11 |
| Bonnie Osinski | 11 |
| Denise Patrick | 12 |
| Phil Rosenbloom | 13 |
| Laurence Scot | 13 |
| Michael Seltzer | 14 |
| Edward Sermier | 14 |
| Mary Tufts | 14 |
| Janet Waterston | 15 |
| Daniel Williams | 15 |

Jillian Barsalou

Jillian Barsalou Kincaid is the incoming Director of Major Gifts at Columbia University's Graduate school of Architecture, Planning and Preservation. She currently serves as a Regional Development Director in Brown University's New York Office of Advancement. In this role, Jillian works with a portfolio of 150 alumni and parents who have the capacity to support the University at the major gift level (\$100,000- \$5,000,000). Her work focuses on strategy development, relationship building, and donor-centric stewardship. Prior to joining Brown in 2009, Jillian was the Assistant Director of Individual Giving at American Ballet Theatre. Outside of the office, Jillian enjoys serving as an advisor to a Rhode Island based non-profit, Books Are Wings, on the organizations fundraising and development strategies. Jillian earned a BA from University of New Hampshire and MPA from Baruch College.

Harry Berberian

Senior Advisor for Communications and External Affairs at Graham Windham

In this role, he has helped his organization recruit new board members, forge partnerships to support families in their communities, and secure [major gifts](#) from individuals to increase the public profile of the agency. He began working for [Graham Windham](#) in 2006 as their Senior Coordinator for Post-Secondary Education helping students in foster care graduate from high school and prepare for college. In 2007, his efforts paved the way for a [memorandum of understanding](#) between The Administration for Children's Services and The NYC Department of Education which gave child welfare agencies access to real time education data for youth in foster care.

In 2008, Harry completed The Baruch College / PASE Emerging Leaders in Child & Youth Services Program. This program helped Harry develop and manage [The Graham Windham Scholars](#) program. Funded by private donors, this pilot program aimed to address the alarming lack of educational opportunity for youth in foster care. In 2009, he was promoted to Director of Education Policy, Planning and Practice and was charged with developing new approaches to improving the educational experience of youth in foster care. In this role, he successfully created and managed a team of education advocates that helped parents and caregivers successfully navigate the NYC Public School System. All of this while raising scholarship funds to help Graham alumni complete college.

In 2011, Harry was promoted to Director of Strategic Partnerships and Resource Development. In that role, he developed interest from [major corporations](#) and individuals and created partnerships with organizations that helped advance Graham Windham's mission and vision. In 2013, Harry co-founded [The 3/20 Project](#) - an informal gathering of emerging leaders and young professionals from NYC's child welfare and juvenile justice systems.

Mr. Berberian earned a BA in History from New York University in 1999 and a JD from the City University of New York School of Law in 2003. He started his career at The Legal Aid Society as the Queens Representative of the Providing Education Assistance To Kids Unit of the [Juvenile Rights Practice](#) representing students who were suspended and arrested in school. In his spare time, Harry enjoys drinking coffee, going to the library and listening to the [HAMILTON](#) soundtrack. Follow him on twitter [@harrytalksgood](#).

John Braunstein***Director, Anthony Knerr and Associates***

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

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

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

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

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

John Casey, Ph.D.***Associate Professor, Baruch College***

PhD (Universitat Autònoma de Barcelona), MPA (Baruch College, City University of New York), BA/BSW (University of Sydney), Grad. Dip. Univ. Teaching and Learning (Charles Sturt University), Certificate IV in Workplace Assessment and Training (NSWVETAB).

I came to Baruch in January 2008. From 1999 to 2007, I taught management, leadership and governance at the Australian Graduate School of Policing, Charles Sturt University, Sydney. From 1992 to 1998, I was the Executive Officer of the Masters in Public Management program at a three-university consortium in Barcelona, Spain, as well as an adjunct professor in public management at the Universitat Autònoma de Barcelona and the Escola d'Administració Pública de Catalunya. Previously, I had been the Director of the Mayor's Office of Adult Literacy for the City of New York, USA and a social services manager in Sydney, Australia. In addition, I have been a part-time consultant on a number of capacity-building projects funded by the European Union and AUSAid (the development agency of Australia). I have worked in the following countries (sometimes only on short-term assignments): Australia, Bulgaria, Colombia, Hungary, Italy, Papua New Guinea, Romania, Solomon Islands, Spain, Ukraine, and the USA.

For more information please visit : <http://sites.google.com/site/johncaseypublications/Home>.

My new book *The Nonprofit World: The Rise of Civil Society and the Nonprofit Sector* will be

published in July 2015.

Susan M. Chambré
Professor, Baruch College

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

Her publications include three books and numerous articles in scholarly and practitioner journals. The books include *Good Deeds in Old Age: Volunteering by the New Leisure Class* (1987), *Fighting for Our Lives: New York's AIDS Community and the Politics of Disease* (2006) and *Patients, Consumers and Civil Society*. Her articles and book reviews on nonprofit organizations, AIDS policy, and volunteerism have appeared in *Nonprofit and Voluntary Sector Quarterly*, *Nonprofit Management and Leadership*, *the Journal of Volunteer Administration*, *Voluntary Action Leadership*, *Social Service Review*, *Policy Studies Journal*, *Health Affairs* and the *Gerontologist*.

Michael Davidson
Board Coach

Michael Davidson is a consultant specializing in nonprofit board development, management support, strategic planning, leadership transition, and executive coaching for nonprofit managers. He has over 20 years' experience in nonprofit board and managerial leadership and has provided board training and retreat facilitation for more than 100 nonprofit organizations. He is the former Chair of Governance Matters, lead consultant for the BoardServe NYC program of the United Way of New York City a member of the selection committee for the Nonprofit Excellence Awards and a member of the faculty of the Milano School of Nonprofit Management at the New School University.

He has been a Peace Corps Volunteer, an Assistant Professor of Anthropology, an Assistant District Attorney and an attorney in private practice. He holds a BS in mathematics from New York State University College on Long Island, a JD from Columbia Law School and an M. Ph in Anthropology from Yale University.

For more detail, see: www.boardcoach.com

Jane Englebardt
Founder, Upshot Advisors, LLC

Jane S. Englebardt is Idea Doula and founder of Upshot Advisors, LLC, a consulting and executive coaching firm that assists leaders in the philanthropic sector to accelerate their success and make effective, measureable and sustainable social change. Prior to establishing Upshot Advisors, Ms. Englebardt was President & CEO of Bideawee, a 100 year-old multi-site nationally prominent nonprofit organization. As Executive Director of the Hasbro Children's Foundation, she funded growth of innovative programs nationwide, and was as founder and director of the September 11th Children's Fund. Ms. Englebardt has also held senior positions at the Big Apple

Circus and KPMG Peat Marwick.

She has served on numerous professional Boards, including serving as Chairman of the New York Regional Association of Grantmakers (now “Philanthropy New York”), which represents over \$3.6 Billion in philanthropic contributions annually. Currently Ms. Englebardt serves on the Leadership Council of the Support Center for Nonprofit Management, and the Advisory Board of the Bellevue Literary Press (2010 Pulitzer Prize for Fiction). She also advises student teams competing in the New Venture Competition at the Berkley Center for Entrepreneurship and Innovation, NYU Stern School of Business.

Ms. Englebardt earned her BA from Connecticut College, MBA from the NYU-Stern School of Business, a post-graduate certificate in Management of Nonprofit Organizations from the NYU Wagner School of Public Service, and professional education certificate in Foundation Strategy from the Center for Effective Philanthropy at Harvard.

Ms. Englebardt is a graduate of Skip Barber Racing School and has driven open wheel racecars since 1998.

Fred Fields

Chief Operating Officer

As COO, Fred Fields has primary responsibility for collaborating with the leadership and staff of OATS to ensure thoughtful planning, efficient operations, professional development, high quality outcomes, and financial strength. In addition, he provides support for the executive director regarding strategic development and organizational advancement. Fred also serves as project director for Connected Communities, a partnership with the City of New York in which OATS provides digital literacy programs at the Senior Planet Exploration Center and 23 senior centers throughout the city, most of which are located in high-poverty neighborhoods. Fred joined OATS from United Way of New York City, where he led the Strengthening NYC Nonprofits group, which built the organizational capacity of over 1,000 organizations by providing grants, technical assistance, executive and staff training, and board development services. Previously, he served as founding Managing Director of Taproot Foundation, New York, and as an executive in London and New York at digital marketing agencies Agency.com and Organic. Fred is a graduate of Georgetown University and the University of Connecticut School of Law. When not helping to run OATS, Fred is busy with his three children, who are sixth-generation Brooklynites.

Michael Feller

Distinguished Lecturer, Baruch College

Dr. Feller's work focuses on professional development in the nonprofit sector. He directs the Hagedorn Internship Program for undergraduates and the Washington Semester internship program for graduate students, as well as managing executive programs for United Neighborhood Houses. He spent 11 years as a teacher and administrator in public schools in New Rochelle and East Harlem and 21 years at JPMorgan Chase, where he was Senior Vice President of Corporate Social Responsibility and President of the J.P. Morgan Chase Foundation. He received his EdD from Columbia University.

Linda Franciscovich
Executive Director, The Grossman Family Foundation

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

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

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

Phil Gartenberg
President, Fulcrum Associates

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

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

In senior positions in both organizations, he:

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

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

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

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

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

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

Hank Goldstein

Principal, The Oram Group, Inc.

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

Clients have included Chautauqua Institution, American Craft Council, American India Foundation, Lingnan Foundation, The Cooper Union, Children's Health Fund, amfAR, Stamford Health Foundation, Fred Hutchinson Cancer Research Foundation, Planned Parenthood Los Angeles, CRUDEM Foundation/Knights of Malta Association, St. Francis College, Human Rights Campaign, Prostate Cancer Foundation, Family Health International, Africa-America Institute, H. Lee Moffitt Cancer Center, Lesbian Gay Bi-Sexual & Transgendered Community Center, New Jersey Institute for Social Justice, Friends of the High Line, New York Urban League, Actors Fund of America, Jewish Senior Life (Rochester), Corporation for Enterprise Development, Howell Living History Farm and many others in recent years. Mr. Goldstein has been an advisor to foundations and families of wealth with emphasis on giving strategies and grantees' accountability issues. Foundations served include Kresge and Ford. Ford and Rockefeller Brothers Fund have previously referred organizations to Oram for client services. Hank is immediate past president of the board of trustees of Women's Prison Association, Chairman of PICO National Network, former trustee and treasurer of Jazzmobile and trustee emeritus of Berkshire Theater Festival. Mr. Goldstein serves on the national scholarship award committee of the Jackie Robinson Foundation.

He has recently received a Muskie MAX Grant Mentorship Award and will be working with NGOs in Kyrgyzstan later this year. Hank is co-author of Dear Friend, Mastering the Art of Direct Mail Fundraising and So You Want to be a Consultant! was published in 2006. Opinion and commentary on current philanthropic trends may be found on the blog Oram Matters, accessed directly on line or through the company's web site. HG is adjunct professor of philanthropic management at The New School for Public Engagement/ Milano School of International Affairs, Management, & Urban Policy. He has overseen 300 studies of nonprofit organizations by his graduate students over 20 years of teaching.

Kathy Herre

Interim Development Director and Development Consultant, Herre Consulting

Kathy Herre has over 25 years of fundraising and management experience in the non-profit sector working at major international and national organizations as well as with community-based organizations with budgets ranging from \$500,000 to \$200 million. Fundraising experience includes Director, Foundation and Corporate Relations at the International Rescue Committee; Federated Campaign Director at Planned Parenthood Federation of America; and Development Director for an international microfinance organization. Management experience includes director of three homeless shelter programs for women and children, manager of a nationwide teen

pregnancy/high school dropout prevention program, and manager of residential youth programs. In 2007, Ms. Herre launched Herre Consulting to provide interim fundraising and management services to non-profits. She has been Interim Vice President for Development at the National Breast Cancer Coalition, Interim Development Director at the Women's Refugee Commission, and Interim Development Director at the National Council for Research on Women and has worked with the Himalayan Cataract Project to develop a strategic plan.

Wayne Ho

Chief Strategy and Program Officer of the Federation of Protestant Welfare

Wayne Ho is the Chief Strategy and Program Officer of the Federation of Protestant Welfare Agencies, a nearly 100-year-old organization where he oversees policy advocacy, member services, and faith based initiatives to advance economic opportunity for vulnerable New Yorkers. Previously, he served as the Executive Director of the Coalition for Asian American Children and Families, the nation's only pan-Asian children's advocacy organization. During his tenure, CACF collaborated with other organizations to successfully promote policies to improve language access, reduce bias-based harassment in schools, baseline funding for community-based child abuse prevention programs, and increase discretionary funding for the Asian Pacific American community. Wayne currently serves on the Board of Directors of Coro New York Leadership Center, New York Foundation, and Partnership for After School Education and is a member of several New York City and State advisory boards. He has also taught leadership and management courses at NYU and UC Berkeley. Wayne has received awards from nonprofit organizations, government agencies, and elected officials, and in October 2014, City & State named Wayne one of its "40 Under 40 NYC Rising Stars." He holds a BA from UC Berkeley and an MPP from Harvard University's Kennedy School of Government, and he completed the New American Leaders Fellowship Program of the Coro New York Leadership Center and New York Immigration Coalition.

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

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

She has extensive experience in both the private and public sectors including her solo private law practice in Washington, DC that focuses on civil and human rights, nonprofit organizations and small minority businesses. Additionally, she has provided leadership on policy and governance issues to a number of non-profit organizations in various roles as manager, general counsel, and board member, including the National Coalition on Black Voter Participation, Inc., where she served as its Executive Director as well as her past positions a Senior Consultant to the President's Initiative on Race during the Clinton Administration, and as past president of the Black Women's Agenda. She is a frequent commentator on public issues such as the Census and has been interviewed by almost every major media outlet in the country, such as National Public Radio, the Washington Post, PBS and CNN. She is currently engaged in research and writing about the interaction of race, media and politics, and the urgent problem of lack of access to higher education by minorities, low income families and immigrant youth.

Fiona Kanagasingam***Senior Consultant, Community Resource Exchange***

Fiona Kanagasingam has over 13 years of experience as a consultant, coach, and trainer in both the nonprofit and private sector. After earning her BA from Columbia Ms. Kanagasingam went to Australia to earn her Masters and has worked throughout Asia. Currently Ms. Kanagasingam is a Senior Consultant with Community Resource exchange where she has lead development of a new practice area focused on innovation in nonprofits, including rolling out a first-ever CRE Innovation Bootcamp for nonprofits. Additionally she advises senior management teams on human capital development, team effectiveness, and strategy development.

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

Sandy A. Lamb founded Lamb Advisors LLC in 2003 to advise nonprofits on mergers, strategic alliances and change solutions.

She comes to this work after a career as a portfolio manager in the MONY Group and a managing director at the investment bank, Lazard Freres & Co., where for 20 years she was responsible for mergers and acquisitions as well as complex corporate financial advisory assignments. Since forming Lamb Advisors, Sandy has assisted nonprofits with researching, analyzing, investigating, structuring, and completing collaborations and other partnership structures including mergers, strategic alliances, and acquisitions.

She has served on the board of several stock exchange-listed companies and nonprofit organizations. She currently serves on the board of Pittsburgh Theological Seminary (Vice Chair), CURE International, and the Vera Institute of Justice. In 2001-2002, Sandy was Chair of the New York Women's Foundation, and until 2012 she was on the board of the Taproot Foundation and the Nonprofit Coordinating Committee of New York.

Peter Levinson

Principal and Creative Director, LevinsonBlock, LLC

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

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

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

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

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

Shoba Nair

Associate Professor, Baruch College, School of Public Affairs

Bonnie Osinski

Fund Development Consultant, Osinski Development Resources

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

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

development for The National Hemophilia Foundation, Inform, Inc. and the National Eating Disorders Association.

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

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

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

Denise Patrick
Adjunct Lecturer

Ms. Denise Patrick has more than 20 years of experience as a project manager, instructor, and corporate trainer with a focus on communication, leadership and diversity & inclusion. She is the Founder of Teach Lead Inspire, an innovative talent development training and facilitation firm based in New York City.

During her career, she has developed a strong passion for developing learning sessions that improve performance in leadership, communication, creativity, teamwork and critical thinking. She believes in striking a balance with her business and her academic experience. Ms. Patrick has worked and learned with organizations like Citicorp Investment Management, Inc., Chancellor Capital Management, JP Morgan, Mellon Bank, Booz Allen Hamilton, the United Way, New York Life, NYC Department of Transportation, NYC Department of Buildings and NYC Office of Emergency Management.

Ms. Patrick is an Adjunct Lecturer with the City University of New York, Baruch College where she teaches undergraduate and graduate courses focused on executive communication, diversity & inclusion, and leadership. She is also a Course Leader with the American Management Association. Prior to joining the faculty at Baruch, she taught at Temple University and the Wharton School of Business, University of Pennsylvania. A member of the Association for Talent Development and Golden Key International Honour Society, Ms. Patrick holds a B.A. in Corporate Communication from the City University of New York, Baruch College and a M.A. in Rhetoric & Communication from Temple University.

Phil Rosenbloom
Consultant

Phil has extensive experience helping mission-focused organizations plan for financial sustainability. Incorporating a combination of financial analysis, business strategy, and organization communication, he helps clients undertake projects such as understanding and adjusting the business model, managing growth, and responding to uncertain funding environments. His approach is based on building a shared data-grounded understanding of financial health and needs among key stakeholders and facilitating clear internal and external communication on financial matters.

Phil developed his financial analysis and consulting skills as Manager of Advisory Services for Nonprofit Finance Fund's New York Program, where he was responsible for leading customized strategic financial consulting engagements with nonprofits in fields such as human services, arts, and social justice. His clients include organizations ranging from small startups to multi-million dollar social service providers. He has also worked with philanthropic institutions to incorporate financial due diligence into their grant making practice, coordinated and managed major technical assistance initiatives, and advised an emerging national data platform on the development and presentation of financial metrics.

Prior to Nonprofit Finance Fund, Philip served as Assistant Director of Payment Operations for The Conference on Jewish Material Claims Against Germany, an international nonprofit engaged in Holocaust reparations.

He holds a BA in Sociology from Oberlin College and an interdisciplinary MA from New York University.

Laurence Scot
Managing Partner, Skody Scot & Company

Laurence Scot is the cofounder and co-managing partner of Skody Scot & Company, a NYC based CPA firm formed in 1990 that specializes in providing auditing, consulting, 990 preparation and other professional services to Not-For-Profit (NFP) organizations.

Prior to starting his own firm he worked for some notable and prestigious companies including Shearman & Sterling (law), American Institute of CPAs (professional membership) and Coopers & Lybrand (public accounting). He is certified in NJ and NY, has an MBA from Pace University, has taught undergraduate and graduate classes at several colleges, been lecturing and giving seminars to CPAs, bankers, directors & officers and management for over 24 years, and the creator of two unique in-class certificate programs, "*NFP Accounting and Governmental Reporting*" previously offered by NYU and "*NFP Financial Management and Reporting*" currently offered by Baruch College School of Public Affairs.

Mr. Scot has received a number of awards for his civic activities including *Citation for Community Service* from the Manhattan Borough President and the *Entrepreneur of the Year Award* from Crain's New York Business. Several years ago, Mr. Scot wrote a desk reference book on Not-For-Profit accounting and reporting, published by John Wiley.

Michael Seltzer
Distinguished Lecturer

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

Edward Sermier
Adjunct Professor, Baruch College

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

He has also served as Chief Financial Officer of the New York Philharmonic Orchestra; Deputy Director in the Mayor's Office of Operations for Mayor David Dinkins; Director of Strategic Planning and Capital Budgeting for the New York City Transit Authority; and Director of Special Education and Budget Director for the New York City Board of Education.

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

Mary Tufts
Deputy Director of Foundation Relations at Baruch College

Mary Tufts has over 20 years' experience in the nonprofit sector, with a particular focus on private and corporate foundation grants and building donor collaboratives. Currently the Deputy Director of Foundation Relations at Baruch College, Mary has also used her professional skills to generate support for NYU School of Law, the Federation of Protestant Welfare Agencies, A Better Chance, and the Twenty-First Century Foundation.

Mary's background encompasses both grant making and grant seeking, giving her a unique perspective on the grant process and relationship. She has served on multiple nonprofit and foundation boards, and served as the New York State Representative to the national Grants Professional Association. As the first person to hold that role, Mary handled regulatory and professional development issues for the grants profession in New York.

Teaching has also been an important and enjoyable part of Mary's work. She has taught at the New York Public Library, SAGE, NYU's Heyman Center for Philanthropy, the Foundation Center and the University of Pittsburgh. Topics include Grant Readiness and Development, Grant

Proposal Writing and Corporate and Foundation Outreach. Mary has also served as a Management Assistance team volunteer for Robin Hood.

Janet Waterston
Consultant

Janet Waterston is a human resources and organizational development consultant with 25 years of experience helping individuals and organizations achieve workplace excellence. Her consulting expertise includes supervisory, leadership, and management development; employee relations; employment regulations; executive and management coaching; meeting and retreat facilitation; and organizational assessments.

Prior to becoming a consultant, Ms. Waterston was the Managing Director of Employee and Volunteer Resources at GMHC, the oldest and largest nongovernment agency addressing HIV and AIDS, and held senior and corporate HR positions in the medical publishing and financial printing industries. Clients span the for-profit and nonprofit arenas and include hospitals, publishers, consulting practices, retail, environmental and advocacy organizations, schools, museums, membership organizations, and faith-based and social service agencies.

Ms. Waterston has an MSW from NYU. JAWatersto@aol.com
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Daniel W. Williams
Associate Professor, Baruch College, School of Public Affairs

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