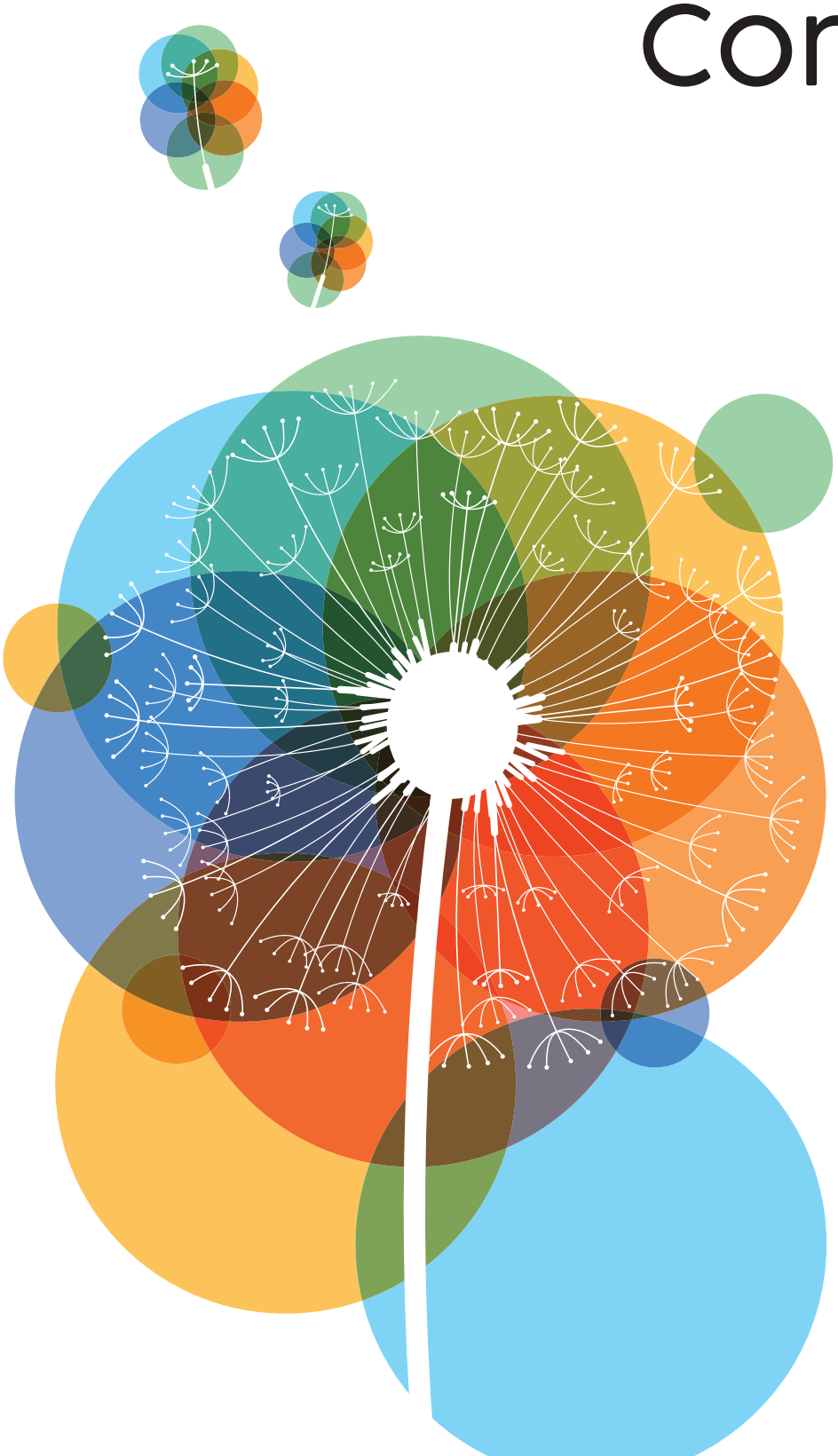
2020

Nonprofit Finance & Sustainability Conference



Virtual Conference

April 14 & 21, 2020

MINNESOTA COUNCIL OF NONPROFITS

power your mission propel nonprofits

2020 Nonprofit Finance & Sustainability Conference

Inside:

Thank you to our sponsors:

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NTH

Executive Education
Opus College of Business | University of St.Thomas

CONFERENCE SCHEDULE

Tuesday, April 14, 2020

8 – 9 a.m. **Bagels & Bytes: IT/Tech Roundable Discussion**

9:15 – 10:30 a.m. **Keynote Session**

Planning to Pivot: Financial Management in Uncertain Times
Hilda Polanco, founder and CEO, Fiscal Management Associates, LLC

11 a.m. - 12 p.m. **Round 1 Breakout Sessions**

A Dialogue: Governing in a Time of Crisis
The Power of Endowment

1 – 2 p.m. **Round 2 Breakout Sessions**

COVID-19: Navigating the CARES Act
Tax Reform: What is the Impact on Charities?

2:30 – 3:30 p.m. **Round 3 Breakout Sessions**

Amplify Your Impact Through People Practices
Economic Justice and System Change

Tuesday, April 21, 2020

9:15 – 10:30 a.m. **Keynote Session**

Crisis as the Catalyst for Change
Amelia Franck Meyer, founder and CEO of Alia

11 a.m. - 12 p.m. **Round 4 Breakout Sessions**

Personnel Strategies in the Face of Impossible Choices
Sustainable Investing: A Governance Guide for Nonprofit Fiduciaries

1 – 2 p.m. **Round 5 Breakout Sessions**

Capital Projects: Charting a Course for Success
Help! I've Been Elected Board Treasurer

2:30 – 3:30 p.m. **Round 6 Breakout Sessions**

QuickBooks: Working Remotely
Transitioning to the Finance Director's Chair

3:45 – 4:45 p.m. **Virtual Happy Hour and Trivia Time**

Interactive Accounting Topics

QUICK CONFERENCE TIPS

Stay Connected and Informed

Connecting with your peers isn't limited to in-person conferences. Join the conversation with Propel Nonprofits, MCN, and fellow conference attendees from your laptop or mobile device!

Twitter: #npfinance20

Download Center

If you missed a session, this is the place to find resources. Recordings of all sessions, as well as workshop PowerPoints and other materials will be available for download following each day's sessions at:

www.minnesotanonprofits.org/2020FC

Bagels & Bytes: IT/Tech Roundtable Discussion

Tuesday, April 14, 8 - 9 a.m.

Grab some breakfast and get ready to participate in this virtual discussion. After a short introduction, facilitators from Propel Nonprofits and Idealware/Tech Impact will guide you to breakout rooms where you can connect with peers from small-to-medium sized organizations. Compare notes on how technology can help you work from home, deliver programs remotely, and raise money during periods of social distancing and sheltering in place. Get advice on how you can make the best of this situation, putting systems and habits in place that make your organization more nimble and resilient for the long term.

Joel Barker, president, Brave North Technology; Karen Graham, director of education & outreach, Tech Impact; Luciano Patino, technology/IT manager, Propel Nonprofits; and Linda Widdop, managing director of client solutions, Tech Impact

Virtual Chat Rooms

MCN and Propel Nonprofits are pleased to partner with our conference sponsors to offer virtual chat rooms to provide attendees an opportunity to connect with experts and other attendees on topics important to their work.

Take some time to learn how these sector allies can help your nonprofit, and the people who make it go, succeed.

April 14

12 - 1 p.m. - NTH, Inc.
12 - 1 p.m. - University of St. Thomas - Exec. Education
3:30 - 4:30 p.m. - CLA (CliftonLarsonAllen)
3:30 - 4:30 p.m. - Mutual of America

April 21

12 - 1 p.m. - NTH, Inc.
12 - 1 p.m. - University of St. Thomas - Exec. Education
3:30 - 4:30 p.m. - Bremer
3:30 - 4:30 p.m. - Mutual of America

Virtual Happy Hour and Trivia

Tuesday, April 21, 3:45 - 4:45 p.m.

The post-conference happy hour is a perennial participant favorite. This year is no different! We'll post recipes for nonprofit finance-themed cocktails and mocktails ahead of time. Or you can share your own. Join us for this fun and fast-paced trivia game with prizes!

Trivia will feature advanced accounting topics. Bring your cell phone to play along for a chance to win prizes. Topics will be introduced multiple choice trivia style with additional context added after questions and answers. This will be an action-packed, high-level session designed to highlight key advanced accounting issues but not dredge through the details of each.

Steve Anseth, partner, Nonprofit Services Leader, Abdo Eick and Meyers, LLP and Becky Johnson, financial manager, WomenVenture

OPENING KEYNOTE

April 14 | 9:15 - 10:30 a.m.

Planning to Pivot: Financial Management in Uncertain Times

Hilda Polanco, founder & CEO, Fiscal Management Associations, LLC

We all had learned skills to build assumptions that reliably helped us predict the next year or two for our organizations. Now we're not sure these tools still work, but we know we have to do something.

As we all find our carefully developed budgets, forecasts, and plans have suddenly been turned upside down, how should we assess our current and future financial positions to be able to develop scenario plans for an ever-changing future?

During this thought-provoking keynote, Hilda will explore the tools and strategies available to us as we develop plans in situations that are shifting by the hour.

ROUND 1 BREAKOUT SESSIONS

April 14 | 11 a.m. - 12 p.m.

A Dialogue: Governing in a Time of Crisis

As nonprofit leaders and team members are racing to keep operations open and to be responsive to the needs of their clients, what is the role of the nonprofit board right now? Where is their leadership needed most to support the organization, its employees, and the recipients of its services? What are the critical changes that are occurring for the organization's finances that have both short-term and long-term ramifications? Join us for a conversation about the role of the nonprofit board in this time of unprecedented uncertainty.

Kate Barr, president and chief executive officer, Propel Nonprofits; John Sullivan, chair, board of trustees, The Minneapolis Foundation; and Kabo Yang, strategic services consultant, Propel Nonprofits

The Power of Endowment

Nonprofit endowments are one of the best ways you can invest in your organization's longevity. They allow you to channel charitable gifts into a single investment that builds over time to create a solid foundation for an organization's future. Join presenters from the Saint Paul & Minnesota Foundation as they explore the power of endowment. The presenters will talk about what an endowment is and the value of having one, along with ways to grow and market an endowment. Led by a team that manages more than 400 nonprofit endowments across the state of Minnesota, the presenters will also demonstrate how to use endowments to create an ongoing source of income for your organization, open your fundraising portfolio to planned gifts, and attract new donors to your organization.

Mariah Brook and Elizabeth McCray, gift planners, Saint Paul & Minnesota Foundation

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Heidi Grinde
612-376-4500
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ROUND 2 BREAKOUT SESSIONS

April 14 | 1 - 2 p.m.

Tax Reform: What is the Impact on Charities?

The Tax Cuts and Jobs Acts continues to impact nonprofits. Charitable contributions reported on individual income tax returns have drastically declined due to changes in the standard deduction. It is important for nonprofits to understand the different giving strategies individuals may consider in the wake of tax reform. In addition to covering the impact of tax reform on charitable giving, this session will review giving alternatives including charitable distributions from individual retirement accounts and best practices for making direct non-cash gifts to public charities.

Larry Mohr, partner, Baker Tilly

COVID-19: Navigating the CARES Act

As a result of the $2 trillion Coronavirus Aid, Relief, and Economic Security Act (CARES Act), among other funding sources, there are a several loan and grant programs providing economic relief for COVID-19 becoming available. This session will unpack the latest guidance about what's known, and offer practical interpretation and advice about how to actually apply for and secure those resources. We'll also highlight useful approaches, tips, and tools to sizing your cash and capital needs as you navigate uncertain times.

Ben Aase and Kelsey Vatsaas, principals, CLA

ROUND 3 BREAKOUT SESSIONS

April 14 | 2:30 - 3:30 p.m.

Amplify Your Impact Through People Practices

People are often described as an agency's key differentiator. The hard and soft costs of your people practices can make or break your agency's sustainability. Attend this session to learn how to mitigate risk factors, proactively address employment-related issues, and create a desirable workplace culture.

Kelly Rietow, principal, Roo Solutions, LLC

Economic Justice and System Change

Increasingly, economic inequality has become a central problem of U.S. society. This rising economic inequality touches on the work of nearly all nonprofits. But how should nonprofit actors conceptualize the economy and develop responses to address the many economic problems that affect the people we serve? This session aims to provide some basic tools for thinking about and responding to economic challenges to promote positive change. We will have an interactive exercise that helps participants map how the economy shows up in the community where you work. We will follow that with discussion of how risk is racialized and how economic system change has occurred historically (and might occur again today).

Gar Alperovitz, co-founder, The Democracy Collaborative; Steve Dubb, senior editor and director, Economic Justice Program, Nonprofit Quarterly; Emily Kawano, co-director, Wellspring Cooperative; and Repa Mehka, president and CEO, Nexus Community Partners

OPENING KEYNOTE

April 21 | 9:15 - 10:30 a.m.

Crisis as the Catalyst for Change

Amelia Franck Meyer, founder & CEO, Alia

We are all going through a very challenging, unchartered time right now. Many people have said that they look forward to returning to normal, which is completely understandable. But what if we can't or don't want to return to the way it was?

Let's take this opportunity to look at some of our current systems and transition to new systems that are more equitable for all they serve. As we plan for the future, what are better, or the best, ways to serve our communities and clients in this new normal we find ourselves in?

During this stimulating keynote, Amelia will explore how we prepare ourselves to use this current crisis to bring about change for good.

ROUND 4 BREAKOUT SESSIONS

April 21 | 11 a.m. - 12 p.m.

Personnel Strategies in the Face of Impossible Choices

This session focuses on personnel strategies and related financial effects for nonprofits who are faced with impossible choices around service continuity, cost reduction, possible layoffs, program closures, and organizational survival. Join us as we consider various approaches to staffing as we manage through the fiscal fallout of the pandemic. The effects of service disruption, loss of funding, working from home, and widespread economic upset are forcing nonprofits of all types to balance many equally important priorities -- preserving our mission, sustaining our wonderful staff, and trying to maintain some semblance of business continuity.

Curt Klotz, director of nonprofit innovation, CLA

Sustainable Investing: A Governance Guide for Nonprofit Fiduciaries

This is a time of fundamental change in the way investors look at opportunity and a significant part of that change comes from the application of sustainable investing concepts to investment analysis and portfolio construction. More and more nonprofits are seeking to align their behaviors with their values - including how they invest. In this session, we will address governance issues that are to be considered to nonprofits contemplating sustainable investing approaches.

James Dykstal, senior consultant, DeMarche Associates; Daniel Lemm, director of finance and treasurer, Blandin Foundation; and Peg VanWagoner, senior consultant, DeMarche Associates

ROUND 5 BREAKOUT SESSIONS

April 21 | 1 - 2 p.m.

Capital Projects: Charting a Course for Success

Capital projects are complicated, stressful, and expensive endeavors for most nonprofits — no matter their size, experience, or resources. With decades of combined experience in the fundraising, real estate, and construction management fields, the presenters believe there is a better way to prepare for and execute these projects. We'll highlight The Reading Center in Rochester and the lessons learned from its challenging — and ultimately successful — effort to construct a new building and achieve greater community impact. The presentation will include insights gleaned from a recent, informal survey of institutional funders that identified: how foundations assess the viability of capital funding proposals; the factors they consider before making the decision to invest; and the predictable, avoidable pitfalls that their grantees often experience during their capital projects.

Paul Johnson, principal, NTH; Cindy Russell, executive director, The Reading Center; and Kim Snyder, principal, Excelsior Bay Group

Help! I've Been Elected Board Treasurer

Were you just elected board treasurer and you're not sure what to do? Are you an executive director who has a new board treasurer and they need some finance skills to carry out their role? Or are you a board chair who convinced your friend on the board to be the treasurer, and now you need to create a financial game plan for the board? This session is geared toward helping new treasurers be successful in their new role on the board. Presenters will cover handy tools and practices that can help board treasurers develop finance skills, ask strategic financial questions, lead board development in finance, and keep the numbers connected to mission.

Mario Hernandez, director of strategic services, and Amanda Ziebell Mawanda, strategic services consultant, Propel Nonprofits

ROUND 6 BREAKOUT SESSIONS

April 21 | 2:30 - 3:30 p.m.

QuickBooks: Working Remotely

The ability to work from home seemed like a luxury not long ago. Now we realize it is a component of disaster planning. How is your nonprofit navigating the change in accounting processes? In this session we'll cover remote access for desktop, moving to QuickBooks online, and apps that support internal controls while functioning remotely. You'll be able to ask questions of expert QuickBooks users and benefit from the wisdom in the "virtual" room.

Megan Genest Tarnow, principal, The Mobius Group and Bethany Gladhill, consultant, GladhillRhone

Transitioning to the Finance Director's Chair

C.F.O., finance director, director of finance, no matter what you call the head of the finance department, when you transition to the position for the first time your roles and responsibilities will change. This session is designed for staff who have recently made or are working to make that transition.

Keven Ambrus, chief financial officer & vice president, finance and Peter Olsen, director of finance and administration, Interfaith Action of Greater Saint Paul

What can you do to ensure that compensation at your nonprofit is fair and accurate?

Participate in the 2020 Minnesota Nonprofit Salary & Benefits Survey and save 50 percent or more on your copy!

Minnesota nonprofits need current and comparative information to establish and justify appropriate salaries and benefits for their staff. To meet this need, the Minnesota Council of Nonprofits is seeking help from organizations like yours.

With the participation of nonprofits like yours, MCN is able to produce one of the most reliable and accurate nonprofit compensation resources in the nation — the *Minnesota Nonprofit Salary and Benefits Survey*.

This year's survey will provide Minnesota nonprofits with:

- Salary data for over 70 of the most common nonprofit jobs, including: Executive Director, Associate Director, Development Director, Program Director and Administrative Assistant;
- Information on medical, dental, disability and life insurance, retirement and paid time off; and
- Compensation practices including raises, bonuses and other incentives.

Participate in this year's salary survey and receive a 50 percent discount on the final report—a $175 savings!

Sign up to participate by May 15, 2020 at:

www.minnesotanonprofits.org/SS

MINNESOTA COUNCIL OF NONPROFITS

SPEAKER BIOGRAPHIES

Ben Aase is a principal with CLA, and leads the Public Sector Group's national K-12 education and consulting practices. Ben works with a range of foundation, nonprofit, and education clients to drive organizational and field-wide change and results at the intersection of strategy, finance, and operations. He is a co-founder and board member of Impact Hub MSP, and a director and vice president of the Cargill Foundation. Ben is former board treasurer of the Givens Foundation for African American literature, a founder of the Minneapolis Professional Chapter of Net Impact, and a review board member for the Social Entrepreneur division of the Minnesota Cup. He has a B.A. in economics from Colorado College, an MBA from the Carlson School of Management, and is licensed by the Standards for Excellence Institute.

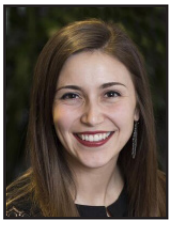
Gar Alperovitz is co-founder of the Democracy Collaborative, a research institution developing practical, policy-focused, and systematic paths towards ecologically sustainable, community-oriented change and the democratization of wealth. He is also co-chair of the Next System Project, a project of the Collaborative. Gar has had a distinguished career as a historian, political economist, activist, writer, and government official. For fifteen years, he served as the Lionel R. Bauman professor of Political Economy at the University of Maryland, and he is a former fellow of Kings College, Cambridge University; Harvard's Institute of Politics; the Institute for Policy Studies; and a guest scholar at the Brookings Institution. Gar has written critically acclaimed books, both on the atomic bomb and atomic diplomacy, as well as on the challenges and promise of economic democracy.

Keven Ambrus is the CFO & vice president of finance at Propel Nonprofits. He has spent his career helping organizations develop financial plans, understand costs, and implement change. He enjoys the inquisitive nature of learning something new and solving problems. Although most of Keven's professional career has been in the for-profit community, he's appreciated the opportunity to contribute to and learn from the nonprofit community over the past few years. Before Propel, he was the director of finance and information technology with the Minnesota's Children Museum. Keven holds an M.B.A. from Embry-Riddle University and is on the boards of COMPAS, Inc. a nonprofit putting creativity into the hands of Minnesotans, and First Universalist Church of Minneapolis.

Steve Anseth, certified public accountant, is a partner at Abdo Eick & Meyers (AEM), a top accounting firm located in Minnesota. In his role at AEM, Steve leads the firm's nonprofit segment. Steve and his team work with over 100 nonprofit organizations from the metro area and outstate Minnesota. He helps nonprofits succeed by improving their operations and internal controls. Prior to becoming a public accountant, he spent 12 years with a large national nonprofit organization. This experience gave him an in-depth understanding of how-and why-nonprofits operate. He has more than 25 years of experience working in and for nonprofit organizations. Steve holds a B.S. in accounting from the University of Minnesota and an M.A. in theological studies from Bethel Seminary.

Joel Barker is president & CEO of Brave North Technology, where he leads the strategic consulting, RFP consulting, compliance, and business planning. He brings his experience working in senior leadership positions for small and large organizations to identify smart opportunities for technology within your organization. Joel is an experienced leader and technology strategist specializing in strategic technology counsel, process improvement, revenue generation, and relationship building. In 2017 he was named a "40 under 40" by *Minneapolis/St. Paul Business Journal*. Joel has a B.A. in marketing & management from Concordia University and holds a Lean Six Sigma - Green Belt designation from the University of St. Thomas.

Kate Barr is president and CEO of Propel Nonprofits, whose mission is to fuel the impact and effectiveness of nonprofits with guidance, expertise and capital. She oversees strategic and business planning, development and external relations. She led the merger of Nonprofits Assistance Fund and MAP for Nonprofits in 2017 to create a premier resource for nonprofits. She is a national leader, speaker and writer on nonprofit strategy and finance. Before joining the organization in 2000, Kate was a bank executive and an arts administrator. She has served on numerous nonprofit boards, currently for Borealis Philanthropy, and the Jerome and Camargo Foundations.



As a gift planner, **Mariah Brook** helps individuals and families initiate and express their philanthropic plan to maximize their giving. In her role, Mariah also provides nonprofits the support to start and grow their endowments and works alongside professional advisors to help them achieve their client's philanthropic goals. The most rewarding part of her job is watching donors be open-handed with the resources they have and the impact it has on community. Mariah joined the Saint Paul & Minnesota Foundation in 2014 after graduating from the University of Minnesota with a bachelor's degree in communication studies. She is involved in her community through various leadership and volunteer roles at her church in downtown Minneapolis and serves on the board of a crisis pregnancy and family support center.

Mary Cleary serves as a consultant to nonprofits in the areas of accounting and fiscal management. Mary's life-long pursuit is to apply an entrepreneurial approach to the management of mission-driven nonprofits. She previously served as the director of finance of Chrysalis, A Center for Women. Her responsibilities included coordinating, creating, and maintaining a $2.5 million operating budget, a $4 million capital campaign budget, and efficiently managing all financial areas of the organization. She established accounting policies, procedures, and internal controls, and developed practical pricing models. Mary earned a B.S. degree in accounting from University of San Francisco. Mary received her MBA from the University of St. Thomas in new venture management, where she wrote numerous business plans and developed a screening tool used to quickly identify viable business models.

SPEAKER BIOGRAPHIES

Steve Dubb is a senior editor at *Nonprofit Quarterly*, where he directs its economic justice program. Steve has worked with cooperatives and nonprofits for over two decades, including 12 years at Democracy Collaborative and three years as executive director of North American Students of Cooperation. In his work, Steve has authored and edited numerous reports; participated in and facilitated learning cohorts; and helped build the field of community wealth building. He is the lead author of *Building Wealth: The Asset-Based Approach to Solving Social and Economic Problems* (Aspen 2005) and coauthor (with Rita Hodges) of *The Road Half Traveled: University Engagement at a Crossroads* (MSU Press 2012). In 2016, Steve curated and authored *Conversations on Community Wealth Building*, a collection of interviews conducted over the previous decade.

Amelia Franck Meyer is a social entrepreneur and the founder and CEO of Alia: innovations for people and systems impacted by childhood trauma. Alia provides systemic interventions, training, consultation, demonstration projects, and coaching to transform child welfare. Before Alia, Amelia was the CEO of Anu Family Services, a child welfare agency located in 90 counties in Wisconsin and Minnesota. Amelia has received numerous awards and recently was featured as one of *People Magazine*'s "25 Women Changing the World" in 2018. Amelia has presented internationally on a range of topics, she has served on national boards, and holds a doctorate in organizational change and leadership from the University of Southern California.

James Dykstal is a senior consultant at DeMarche where he specializes in asset allocation and capital markets research. James is a frequent speaker on issues such as fixed income, alternative credit, and defined contribution plans. Prior to joining DeMarche, James was treasurer and fixed income manager for FC Stone Group. Prior to that, he was vice president and senior portfolio manager at Commerce Trust Company. He also held the positions of vice president at First Tennessee Capital Markets and investment advisor at Southwest Corporate Federal Credit Union. James earned his MBA from the University of Missouri and his bachelor of business administration in finance from the University of Wisconsin – Madison. He is a chartered financial analyst (CFA) and a member of the CFA Institute and the CFA Society Kansas City.

Megan Genest Tarnow is the founder and principal of The Mobius Group, a QuickBooks-centric consulting firm ferociously committed to helping nonprofits tell their stories and advance their missions through rock-solid, actionable financials, and to supporting the individuals in those organizations who have financial responsibilities. Megan also works with Gregg Bossen of QuickBooks Made Easy, providing QuickBooks technical support to nonprofits around the country.

Bethany Gladhill of Gladhill Rhone is a consultant in nonprofit and arts management, and in historic preservation. She served 12 years at the renowned Theatre de la Jeune Lune, as well as serving as the finance director for the Jungle Theater, and most recently as managing director for Nautilus Music Theater. Bethany has a masters of arts in historic preservation from Goucher College. Recent preservation projects include historic contexts for Lake City, Waseca, and Mankato, and an interpretive plan for the Upper Post of Fort Snelling. Her community involvement includes the Summit Avenue Residential Preservation Association, Summit-University Planning Council, Ramsey Hill Association, and more. Bethany's awards include the McCullough Award, a Blacklock fellowship, an Institute for Community Cultural Development fellowship, and an Emerging Preservation Leader scholarship.

Karen Graham is a sought-after speaker, trainer, writer, and consultant with expertise in technology leadership and innovation, nonprofit software and digital strategy. As Idealware's executive director she leads a team of researchers, presenters and writers who create technology information resources designed to help nonprofit leaders put their vision into action. Her past experience includes leading the technology consulting services and nonprofit technology learning and networking programs at MAP for Nonprofits, helping to build the nonprofit CRM/database solution provider thedatabank from a startup to a thriving software company, and various roles in arts and human services organizations. She holds an M.B.A. in nonprofit management from the University of St. Thomas.

Mario Hernandez is the strategic services director of Propel Nonprofits. Mario is a firm believer of nonprofits' ability to build and sustain a more just society. He's been in the nonprofit sector for over 20 years, and has served in numerous executive leadership and board roles - program director, executive director, vice president and chief operating office, board chair, board vice chair, and board treasurer (numerous times!). Given his many hats with many organizations, he loves to share what he's learned with other nonprofit leaders. Mario enjoys talking strategy; action-oriented operation plans and marketing campaigns; collective impact through collaboration; inclusive leadership development; and, paying for it all through sustainable business models.

Paul Johnson is principal at NTH. Paul has over 20 years of experience in commercial construction project management and works with companies on comprehensive project budget development, project scheduling, contractor and architect selection and management, and related services. He brings considerable experience with nonprofit, government, and performing arts projects, including The Family Partnership, CHS Field, Palace Theatre, Orchestra Hall, St. Paul Academy's Huss Center for Performing Arts, and MacPhail Center for Music. He serves on the boards of Northern Lights.mn and Minneapolis Regional Chamber of Commerce. Paul holds a bachelor of science in construction management from Arizona State University.

SPEAKER BIOGRAPHIES

Becky Johnson is the finance manager at WomenVenture, a nonprofit that helps women start and grow profitable and sustainable businesses. She was previously the finance manager at with the Minnesota Council of Nonprofits (MCN). Prior to MCN, she was an auditor for Mahoney, Ulbrich, Christiansen, Russ, a small public accounting firm. She is a certified public accountant. Becky has a bachelor's degree in accounting from the Minnesota State University - Mankato.

Emily Kawano is co-director of the Wellspring Cooperative Corporation, which is seeking to create an engine for new, community-based job creation in Springfield, Massachussetts. Emily also serves as coordinator of the United States Solidarity Economy Network. An economist by training, she served as the director of the Center for Popular Economics from 2004 to 2013. Prior to that, Emily taught economics at Smith College, worked as the National Economic Justice representative for the American Friends Service Committee and, in Northern Ireland, founded a popular economics program with the Irish Congress of Trade Unions.

Curtis Klotz serves as director of nonprofit innovation at CLA. This role is grounded in CLA's nonprofit consulting and business operations practice, which inspires Curt's writing and thought leadership in the industry. Curt shares inventive strategies that have emerged from more than 30 years of direct work in nonprofit organizations, including his former role as VP of finance & CFO at Propel Nonprofits. While at Propel, Curt authored numerous blog posts, including frequent online contributions to Nonprofit Quarterly. Curt was honored as *Minneapolis / St. Paul Business Journal*'s Nonprofit CFO of the Year in 2017. Along with other stints as a nonprofit CFO, he is also past chairperson of the Montana Nonprofit Association. Curt graduated from St Olaf College withmajors in women's studies and religion and is a certified public accountant.

Daniel Lemm is the director of finance and treasurer at Charles K. Blandin Foundation. In this role, he is responsible for Blandin Foundation's overall financial management. Prior to joining Blandin Foundation, Daniel held the positions of accountant at The McKnight Foundation, director of programs and finance at Native Americans in Philanthropy, and finance director at Lower Sioux Community. He earned undergraduate degrees in accounting from Metropolitan State University and finance from Iowa State University, and has completed coursework for a master's degree in nonprofit management from Hamline University. He is a certified management accountant and certified fraud examiner. Daniel serves on the board of Tofte Lake Center and has had fiduciary responsibilities with numerous other nonprofits. He is an enrolled member of the Lower Sioux Community.

Beth McCray, gift planner, has a passion for helping donors realize their philanthropic dreams and uses her background in finance and gift planning to make that happen. She also has a passion for seeing the nonprofit landscape thrive and works closely with nonprofit endowment holders. Beth is a frequent speaker on planned giving, endowments, and charitable planning. She joined the Saint Paul & Minnesota Foundations after serving as director of gift planning at the Blake School. She gained financial experience at Thrivent Financial, Wells Fargo and Morgan Stanley. Beth earned a bachelor of arts degree from Williams College. She has served on the board for the Annex Teen Clinic and the Bridge for Youth, and has volunteered as a guide at the Minneapolis Institute of Arts for 20 years.

Repa Mehka serves as president and CEO of Nexus Community Partners, a community building intermediary that works at the intersection of community building and community development, engaging communities of color to achieve equitable, sustainable neighborhood revitalization in the Twin Cities region. Repa has 30 years of experience in community-based leadership and community capacity building, especially in urban settings. He is a founding member of the Northside Funders Group and serves on its advisory committee and racial equity working committee. Repa is also a board member of Shared Capital Cooperative and sits on their loan committee. He is co-founder of the Twin Cities African American Leadership Forum and sits on the board of the Minnesota Council of Foundations, where he is a member of its Government Relations & Public Policy committee.

Larry Mohr is a tax partner at Baker Tilly and leads the Central Region tax-exempt organizations tax practice. He has more than 30 years of experience providing tax services to tax-exempt organizations, including those in higher education, healthcare, social services, and the arts. Larry works with nonprofit organizations throughout their lifecycle – including formation, operational planning, joint ventures, acquisitions, and liquidations. He consults with tax-exempt organizations on a variety of issues, including unrelated business income, deferred compensation, alternative investments, foreign reporting, and charitable contribution substantiation. Larry teaches the Tax-Exempt Organizations course in the University of Minnesota's Master of Business Taxation program and is a frequent speaker on governance and tax issues. Larry graduated from the University of Minnesota with a bachelor of science in accounting and a masters of business taxation.

Peter Olsen is the director of finance & administration at Interfaith Action. Peter has 20 years' experience in the nonprofit industry, his first 12 in public accounting auditing nonprofits and the last seven working for nonprofits. He was previously the chief financial officer of the YWCA St. Paul. While accounting is Peter's career, nonprofits are his passion. When not at work, he serves as the president of the board of directors for the Nonprofit Financial Group and as the vice-chair for Ideal Credit Union. Peter is a certified public accountant.

SPEAKER BIOGRAPHIES

Hilda Polanco, founder and CEO, has led FMA to become the go-to capacity builder that foundation and nonprofit leaders seek to address financial management issues. A nationally recognized leader, Hilda contributes to the sector in many ways. She has served as an adjunct professor at Columbia University's Department of Health Policy and Management and Columbia Business School's Executive Education program. She serves on the board of Hispanics in Philanthropy and the national advisory board of the Harvard Journal of Hispanic Policy, and is a member of the National Network of Consultants to Grantmakers. Hilda graduated from New York University with a B.A. in accounting. She holds a certification from the Institute of Internal Auditors and the chartered global management accountant designation awarded by the American Institute of Certified Public Accountants.

Luciano Patiño is the information technology and data manager at Propel Nonprofits. A Salesforce certified administrator and avowed geek, Luciano designs and implements Propel's data and technology solutions. Luciano also leads workshops on cultural competency, using the Intercultural Development Inventory and other tools. Luciano has a bachelor of science in business degree from the Carlson School of Management at the University of Minnesota.

Kelly Rietow helps leaders and organizations create simple and sustainable solutions to people and process challenges. She excels in aligning human resource and performance management systems with organizational strategies. With broad-based expertise in human resources, organizational development, facilitation and leadership, Kelly helps leaders and organizations be accountable and effective. Kelly has a particular passion for optimizing the performance of nonprofits and organizations experiencing growing pains. A two-time recipient of the Employers Association Best Practices Award, Kelly earned her M.B.A. from the University of St. Thomas and the professional in human resources certification through the Society for Human Resource Management.

Cindy Russell is executive director of The Reading Center. The Reading Center, based in Rochester, offers a full array of services for dyslexic students and their families both in-person and online. Previously, Cindy held positions as the director of development at the Rochester Area Family Y and as associate director of development at Interfaith Ministries. Cindy has spent her career serving nonprofit organizations; her focus areas are nonprofit management, fundraising, marketing, and program supervision. She has a B.A. in religious studies from Texas Christian University and an M.A. in religion from Yale University.

Jessica B. Smith is an HR consultant at CLA. Jessica is a skilled HR professional who balances a passion for learning and development, coaching, and comprehensive performance management with the ability to manage day to day generalist functions like compliance, employee relations, recruitment and retention, and human capitol systems assessment and optimization. She has a unique background ranging from adjunct professor in a competitive master's degree program to leadership roles in complex nonprofits. Jessica previously served in New York City for local and nationally matrixed organizations as in-house human resources and organizational development leadership, and provides outsourcing and consulting services varying from focused projects to broad functional oversight. Her HR experience includes roles as director of human resources, national director of organizational development, and HR consultant.

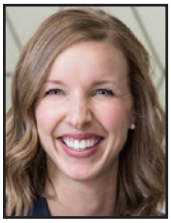
Kim Snyder, principal at Excelsior Bay Group, has 20 years of fundraising experience within the Twin Cities and greater Minnesota philanthropic communities. Her career has included leadership positions at Children's Foundation – the fundraising arm of Children's Hospitals and Clinics of Minnesota, the Humphrey School of Public Affairs at the University of Minnesota, and at Ridgewater College. In her current role, Kim assists nonprofits in all aspects of fundraising, including corporate, foundation, and governmental grants, annual fund, major and planned giving, capital campaign development and execution, corporate sponsorship, board and volunteer engagement, and donor stewardship. She was educated at the University of Minnesota, graduating with a B.A. in history, then gaining master's degree in public policy from the Humphrey Institute with emphases in nonprofit management and education policy.

When he retired in 2011, **John Sullivan** was a member of Imation's executive operations team, directed its worldwide legal staff, and supported the Imation board of directors. John previously served as vice president and general counsel at Silicon Graphics and as general counsel at Cray Research. He currently serves on the board of directors for the Regions Hospital Foundation and the Matthew Shepard Foundation, and on the board of trustees for the Minneapolis Foundation. John is a member of the community advisory boards for both Theatre Latte Da and Frank Theater. He is also an adjunct faculty member of the University of Minnesota Law School. John holds a doctorate of jurisprudence degree from the University of Notre Dame and a bachelor of arts degree in quantitative methods from St. Thomas.

SPEAKER BIOGRAPHIES

Peg VanWagoner is a senior consultant for DeMarche and specializes in advising defined contribution plans, foundations, endowments, and religious organizations. She is a frequent speaker on current trends in defined contribution plans, asset allocation, sustainable responsible investing, and fiduciary responsibilities. Prior to rejoining DeMarche Peg served as vice president and senior relationship manager at American Century Investments. Previously, she was director of client service and consultant relations for Thomson Horstmann & Bryant. Peg earned her MBA from Rockhurst University and her bachelor of science in business administration from the University of Kansas. She is a member of the CFA Institute and the CFA Society Kansas City. Peg is an advisory board member of the Kansas City Women's Foundation and the School of Social Welfare at the University of Kansas.

Acacia Willey is a senior accounting & finance consultant at Propel Nonprofits. Acacia has been working in the nonprofit sector for over 20 years. She has experience in a variety of roles: technology support, program management, financial management, human resources, and fundraising. Prior to joining Propel Nonprofits, Acacia was a senior accountant at a public accounting firm. She has since determined she is a nonprofit lifer! With a passion for helping others and a natural gift for problem solving and analyzing numbers, there's no better way to support nonprofits carrying out their missions than to coach, train, and teach nonprofit organizations and accounting professionals.



Kelsey Vatsaas, principal at CLA, works with clients across the country to assist them with challenges involving strategy, operations, and finance. Kelsey helps CLA's clients improve clarity and accuracy of financial reporting, reorganize finance and operational departments for increased productivity, perform financial analysis and benchmarking to highlight or support key issues and trending concerns, and plan for their organizational and financial futures. She leads CLA's national team providing finance and operations assessments for clients across the country. Kelsey is a finance committee member and former board member and treasurer for Clare Housing and a former board member and volunteer for Cradle of Hope. She has a bachelor of science in accounting from Northwest Missouri State University, an MBA from the University of St. Thomas and is a certified public accountant.

Kabo Yang is a strategic services consultant at Propel Nonprofits, collaborating with nonprofit organizations in the areas of strategic planning, board governance, and organizational impact. She joined Propel in 2019 with twenty years of experience working and consulting in the nonprofit sector, and serving on nonprofit boards, local and national. Kabo is an adjunct faculty at St. Catherine University, teaching in the Master of Arts of Organizational Leadership program, and will join the Humphrey School of Public Affairs this fall teaching Nonprofit Management and Governance. She has an undergraduate degree in business administration, a graduate degree in organizational leadership, and is currently pursuing her doctorate degree in organizational development and change.

Amanda Ziebell Mawanda is a strategic services consultant at Propel Nonprofits. Amanda has over a decade of experience working in the nonprofit sector as a consultant and is focused on building common vision, igniting creativity, and unleashing energy for positive change. She brings her experience in organizational leadership and development, including change management, strategic planning, and board development, to her consulting practice. Amanda was formerly responsible for providing strategic network development in the areas of education equity and faith-based action at two different organizations. She believes deeply in the power of our communities to create a more just and equitable world; she seeks to strengthen this power by building more positive organizational cultures, fostering learning environments that encourage full participation and creativity, and strengthening relationships.

Linda Widdop is managing director of client solutions at Tech Impact, a nonprofit whose mission is to empower communities and nonprofits to use technology to better serve our world. Linda manages all aspects of client relations at Tech Impact, including educating nonprofits about technology solutions. She works with local, regional, and national partners to provide the nonprofit community with increased knowledge of technology through speaking engagements.

About the Minnesota Council of Nonprofits

The Minnesota Council of Nonprofits (MCN) is the statewide association of over 2,200 nonprofit organizations. Through its website, resource publications, workshops and events, cost-saving programs and advocacy, MCN continually works to inform, promote, connect and strengthen individual nonprofits and the nonprofit sector.

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Propel Nonprofits fuels the impact and effectiveness of nonprofits with guidance, expertise, and capital. Its services including accounting technical assistance, board development, fiscal sponsorship, loans for nonprofits, strategic consulting, free online resources, and trainings for nonprofits in Minnesota, Wisconsin, Iowa, North Dakota, South Dakota, and the Native nations in the region.

No-Cost Technical Assistance

Propel Nonprofits is providing no-cost technical assistance to nonprofits in the Upper Midwest as it relates to finance, strategy, and governance questions or concerns. Whether you need to revise your cash flow projections, a sounding board as you strategize next steps, or guidance as a board member on how you can be most supportive, don't hesitate to reach out to any of our staff or contact us at 612-249-6700 or info@propelnonprofits.org.

Free Accounting Helpline

We know a lot of nonprofit accounting is learning by doing, and often talking to an expert is more helpful than finding the perfect Google search result. Whether you're struggling to make changes to your chart of accounts, are new to QuickBooks Online and have questions, want a better way of presenting your finances to the board, or have some other accounting challenge, give us a call at 612-249-6640.

Free Online Trainings

April 22: How to be a Great Board Chair

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To register, go to propelnonprofits.org and click on training.

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