

CAMP FINANCE 2019 Presenters & Panelists



Peter Andrew, President & CEO, Council Services Plus, Inc.

Mr. Andrew is President and CEO of Council Services Plus (CS Plus), an insurance brokerage headquartered in New York State. Mr. Andrew has more than 25 years of experience in the insurance industry and currently holds licenses for Life, Health, Property and Casualty. He is also a Certified Professional Insurance Agent (CPIA) designation holder.

He is a frequent speaker on issues such as employee benefits and risk management. He has contributed to, and been quoted on, nonprofit insurance issues in *The Chronicle of Philanthropy*, the Nonprofit Risk Management Center's e-newsletter, and Guidestar's e-newsletter. In addition Peter has provided trainings to New York State Society of CPA's, The National Council of Nonprofits and the NYS Attorney General's Charities Bureau.

Peter also currently serves on the Board of Directors of Good Causes, a nonprofit that supports and promotes affordable and comprehensive insurance for New York Nonprofits. Previously, he served as President of the Nonprofit Risk Management Center based in Leesburg, VA, is a past President of the Northeastern New York Chapter of the National Association of Health Underwriters (NAHU) and served on the board of directors of the NYS Association of Health Underwriters (NYSAHU).



David Birdsell, Marxe Dean of the Austin W. Marxe School of Public and International Affairs at Baruch College and Special Assistant to the President for Institutional Effectiveness

David is the Dean of the Marxe School of Public and International Affairs at Baruch College of the City University of New York. A widely published scholar, his academic work centers on public communication, its intersections with information technology, and the role of urban universities in the cities they serve. He was named to the inaugural classes of *City & State's* "50 Over 50 New Yorkers" and "Higher Education Power 50." Deeply involved in the nonprofit sector, David chairs the boards of Governance Matters and the New York Federal Statistical Research Data Center; he also sits on the board of the New York Council of Nonprofits. David is a past President of NASPAA and was elected a Fellow of the National Academy of Public Administration in 2015. He has his BA and MA degrees from the University of Virginia and his Ph.D. from the University of Maryland.

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Allan M. Blum, CPA, Partner, New York Audit & Accounting Director, BKD CPAs & Advisors LLP

Allan brings more than 29 years of experience to the clients he serves, providing a wide range of audit and accounting transaction services. He works with a variety of entities within the not-for-profit and health care industries, including hospitals, social service agencies and religious organizations. Allan is also the New York Office Audit and Accounting Director.

He is a member of the American Institute of CPAs and New York State Society of Certified Public Accountants (NYSSCPA), where he is a former chair of the not-for-profit organizations committee.

A regular speaker, Allan has presented for NYSSCPA, New Jersey Society of Certified Public Accountants and Connecticut Society of CPAs. Topics have included mergers and acquisitions, fair value measurements, endowments, related-party disclosures and general accounting and auditing updates for not-for-profit organizations. He is a 1989 graduate of Queens College, CUNY, New York.



Terra Carnrike-Granata, Senior Vice President and Director of Information Safety, NBT Bank

Terra Carnrike-Granata is Senior Vice President and Director of Information Security for NBT Bank. She oversees the company's Information Security and Fraud Risk Department and provides strategic leadership to support information security policies, practices and standards.

Carnrike-Granata has over 10 years of experience in the financial services and information security industries. She joined NBT in 2008 as Assistant Vice President and Information Security Officer. She was promoted to Information Security and Fraud Risk Manager in 2015 and Director of Information Security in 2017. Prior to joining NBT, Carnrike-Granata was employed by New York State Division of Criminal Justice in the Office of Internal Audit and Compliance.

Carnrike-Granata holds a master's and bachelor's degrees in Criminal Justice from the State University of New York Albany School of Criminal Justice. She also holds Comp TIA Security+ and Certified Third-Party Risk Professional certifications.

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A resident of Guilford, New York, Carnrike-Granata is a member of the Rutgers University Cybersecurity Advisory Board. Active in the community, she is a member of the Holy Family School Parent Teacher Organization past Chair of the Chenango United Way Board of Directors.

Donna M. Cole-Paul, Transactions Section Chief, Charities Bureau

Donna Cole Paul, is the Section Chief for the Transaction Section of the Charities Bureau in Albany. She began her career with the New York State Office of the Attorney General as an AAG with the Civil Recoveries Bureau in the Mental Hygiene Unit. Prior to her service with the OAG, Ms. Cole Paul was in private practice in the Albany area practicing in the areas of trust and estates, elder law, real estate and contract law. She is a graduate of Albany Law School and Union College in Schenectady where she obtained a joint JD/MBA. She graduated from Siena College where she obtained her Bachelor's degree in Political Science and a certificate in International Marketing, Finance and Foreign Languages.



Allen L. Fetterman, CPA, MBA

Allen L. Fetterman, CPA, MBA lectures extensively on not-for-profit accounting, auditing, federal single audits, tax-exempt issues and governance. He speaks at conferences, seminars and webcasts throughout the country. Allen was an assistant professor of accounting at a local college and has been a guest lecturer at Yale University and New York University. He has been a member of the Faculty Bank of the Foundation for Accounting Education (FAE). He is a past recipient of both the AICPA's and the FAE's Outstanding Discussion Leader Award. He has written articles published in national accounting periodicals in the United States

and Israel on accounting and taxes for not-for-profit entities.

Allen has served on the American Institute of CPAs Not-for-Profit Organizations Committee, Not-for-Profit Audit and Accounting Guide Task Force and Joint Trial Board. He has chaired the New York State Society of CPAs Not-for-Profit Organizations, Professional Ethics, Audit, and Quality Controls Committees and the AICPA Joint Trial Board. He has also served as Vice-President of the New York State Society of CPAs and as a Trustee of the Foundation for Accounting Education.

Allen retired in 2003 from Loeb & Troper, where he spent thirty-six years serving not-for-profit entities as an auditor and consultant, the last twenty-five years as a partner. In addition to his client responsibilities, he was the partner in charge of the firm's quality controls and technical resources.

Allen received his BBA in Accounting from The City College of New York in 1968 and his MBA in Accounting from the Bernard M. Baruch College in 1972. He was elected to Beta Gamma Sigma, the national honorary society in business. He received his CPA certificate in 1973 and is a member of the

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American Institute of Certified Public Accountants and the New York State Society of Certified Public Accountants.

Allen has served on the governing boards of not-for-profit organizations, including positions as President, Treasurer and Chair of the Audit Committee and the Finance Committee.

Allen and Mimi, his wife of 50 years, live in West Nyack, New York. They have two sons and four grandchildren.



Stacey Grady, CPIA, CRFE- Director of Development, The Springbrook Foundation

Stacey Grady has more than 12 years of experience in the field of fundraising. Currently, as Director of Development and a member of the leadership team at Springbrook, one of New York State's largest and most successful nonprofits supporting people with developmental disabilities, Stacey oversees operations of The Springbrook Foundation and all aspects of fundraising including major and annual giving, special events, foundation & government relations, and legacy giving. In addition to her work at Springbrook, Stacey has worked at a variety of nonprofits including private colleges and museums. Stacey holds her Certificate in Fundraising Executive credential, is President of The Cooperstown Chamber of Commerce, on the board of the Cooperstown Graduate Association for the Cooperstown Graduate Program and has presented her work at a variety of conferences across the country.



Karin Kunstler Goldman, Deputy Chief, Attorney General's Charities Bureau

Karin Kunstler Goldman is the Deputy Bureau Chief in the New York State Attorney General's Charities Bureau. Karin is a former president of the National Association of State Charity Officials and was a founding member of the Governance Matters. She also served on the advisory board of New York University's National Center on Philanthropy and the Law and was a member of the Internal Revenue Service's Advisory Committee on Tax Exempt Entities. As a volunteer, Karin participated in training programs conducted for charity regulators throughout the country by the National State Attorneys General Program on Charities Regulation and Oversight Project at Columbia University Law School. Prior to joining the Attorney General's office, Karin was a Reginald Heber Smith Fellow and a staff attorney at

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South Brooklyn Legal Services Corporation. As an Eisenhower Exchange Fellow in Hungary, Karin worked with nonprofit organizations, government officials and legislative drafters in developing the law and regulations affecting Hungary's nonprofit sector. She has consulted with government officials and legislative drafters in Ukraine and China on the development of statutory regulation of charitable organizations in those countries. Karin was a guest of the People's Republic of China at its 2007 International Symposium on Charity Legislation in China at which she was a speaker, and in 2015 she participated in workshops in China on the developing nonprofit law. Karin is a co-author of State Regulation and Enforcement in the Charitable Sector, a 2016 report of the Urban Institute. She and her husband, Neal, spent two years as Peace Corps volunteers in Senegal, West Africa. They have two children and four grandchildren. Karin has a law degree from Rutgers University Law School, a BA from Connecticut College and an MA from Columbia University.



Eric Laughlin, CPIA, Manager, Broker Services, Council Services Plus, Inc.

Eric has over 11 years of experience in the Insurance and Employee Benefit sector. His entire professional career has been dedicated to the nonprofit sector. He currently holds licenses for Property, Casualty, Life, Accident and Health Insurance. Eric also holds a Certified Professional Insurance Agent (CPIA) designation and is certified to sell Flood Insurance.

The mission of Council Services Plus is to provide quality service, comprehensive coverage, and competitively priced insurance and employee benefits to nonprofits and related organizations in a manner that strengthens the work of the New York Council of Nonprofits and the nonprofit community. In all that we do, we strive to exemplify the highest standards of business ethics and personal integrity; and recognize the value that nonprofits bring to our communities.



Dabash Negash, Chief of Staff at NYC Services, Office of the NYC Mayor

Dabash Negash is the Chief of Staff at NYC Service, a division of the Mayor's Office building partnerships to deepen and expand civic engagement through volunteer and service programs, creating sustainable change for our city's greatest needs. Prior to joining the Mayor's Office, Dabash served as Deputy Director of the Fund for Public Advocacy, supported several campaigns, and worked in the Obama Administration supporting operations. In addition to being Chief of Staff at NYC Service, she currently facilitates trainings around volunteer engagement and management and oversees NYC Service's volunteer capacity building work.

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Barbara D. Paxton, Chief Program Officer, Governance Matters, Inc.

Barbara is a pragmatic and creative nonprofit leader with experience in board leadership, board development and governance, fundraising and finance. Barbara has an unusual breadth of experience that enables her to see the big picture, while also drilling down into the nuts and bolts of any project. She has served as an executive director, a development director, a chief finance officer and has worked in corporate finance. Barbara is currently the a Chief Program Officer at Governance Matters, after having served as Interim Chief Development officer at The Child Center of NY; the Director of Development at Helene Fuld College of Nursing in Harlem; Executive Director of Children of Bellevue, a nonprofit that raises funds for children’s programs at Bellevue Hospital Center; and Director of Major Gifts and Special Projects at the YWCA of the City of New York. She has served on the Boards of The Pearl Theatre Company, Heiress Productions and the New York Junior League. Barbara has a BA degree from Wellesley College and an MA from Columbia University School of International and Public Affairs.



Mina Poricanin, Partner- Labor and Employment Group, Hodgson Russ, LLP

Mina Poricanin is a partner in the Labor and Employment Group at Hodgson Russ LLP. She focuses her practice on advising employers in all aspects of employment law and labor relations, including compliance with wage and hour requirements, leave laws and accommodations in the workplace for disabled employees, termination and discipline of employees, unemployment insurance and workers’ compensation, as well as defending employers against claims of discrimination, harassment, retaliation, worker misclassification, wage and hour claims, and any other employment-based claims.



Tom Ralser, Principal, Director of the Outcomes Lab, Convergent Nonprofit Solutions

Tom has worked with organizations of all kinds, from Chambers of Commerce to religious organizations, national museums to rural health networks, and local youth organizations to international research institutes. He pioneered the concept of applying return on investment (ROI) principles to nonprofit fundraising, and fundraisers have described his work as the “silver bullet” that justifies larger investments in nonprofit organizations.

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Hundreds of organizations have utilized Tom's sustainability planning techniques to ensure they can thrive in a tight money environment. He holds the Chartered Financial Analyst (CFA) designation, which provides the framework for his *Investment Driven Model*[™] of fundraising, and led to the development of the *Organizational Value Proposition*[™], which is widely used by corporations, foundations, and individuals as confirmation that the nonprofits in which they invest are truly delivering outcomes with values. His specialty of utilizing for-profit concepts and methods in the nonprofit world has helped nonprofits raise over an estimated \$1.6 billion in the 22 years he has worked with them.

Tom is a frequent and highly acclaimed speaker, addressing topics about attracting new funders, outcome-based sustainability planning, and delivering value to investors.



David M. Rottkamp, CPA, Audit Partner & Not-for-Profit Practice Leader; New York City Office - Partner-in-Charge New York, NY

David M. Rottkamp, CPA, is an Audit Partner, Not-for-Profit Practice Leader, and the Partner-in-Charge of New York City Office at Grassi & Co. David has more than 29 years of experience providing audit and advisory services to the not-for-profit industry. David's technical knowledge allows him to provide specific services, including Uniform Guidance (formerly OMB A-133) compliance audits and retirement plan audits. Since beginning his career, David has advised some of the area's most successful not-for-profit organizations in areas such as: financial reporting systems, implementation of Executive Order 38 and the NYS Nonprofit Revitalization Act guidelines, internal control reviews, developing financial forecasts, and providing quality board education and governance advice. An authority in the industry, David has presented on a variety of topics relating to organizations funded by Federal and New York State governments, including government grants and contracts, Medicaid, Medicare and other third party insurance companies. David has conducted educational seminars for clients, accounting industry groups, and Not-for-Profit member organizations. He has presented to the Financial Managers Association (FMA) for almost 20 years, Interagency Council of Mental Retardation and Developmental Disabilities Agencies, Inc. (IAC), the New York State Society of CPAs Foundation for Accounting Education (FAE), and the New York Council of Nonprofits (NYCON) at their annual Camp Finance. David is also an adjunct professor at New York University (NYU) in Manhattan. To give back to the industry in which he serves, David is a member of the National Board of Directors of the National Multiple Sclerosis Society, is chair of National's Audit Committee, and also serves on their Executive and Compensation Committees, having a unique and even broader impact on the organization's well-being.

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Patricia C. Sandison, Partner- Tax-Exempt Organizations and Corporate & Business Practices, Hodgson Russ, LLP

Patricia Sandison is a partner in the Tax-Exempt Organizations and Corporate & Business Practices at Hodgson Russ LLP. She focuses her practice on nonprofit law, advising nonprofit organizations in matters relating to legal requirements and best practices in connection with governance and operational matters, with particular emphasis on issues involving formation and dissolution of nonprofit organizations, obtaining

and maintaining tax-exempt status, intermediate sanctions, donor-advised funds, board governance, joint ventures, mergers and restructuring.



**Doug Sauer, CEO, New York Council of Nonprofits, Inc.
CEO, Governance Matters**

Since 1980, Doug Sauer has provided leadership to the New York Council of Nonprofits, Inc. (NYCON; www.nycon.org), a 501c3 nonprofit and the largest state association of nonprofits in the country with over 3,000 nonprofit members. In 2015, NYCON acquired and Doug also became the CEO of Governance Matters, Inc. (www.governancemattersusa.org), a NYC-based board training, recruitment and placement charitable organization that also operates boardnetUSA, our nation's premier and first online nonprofit board matching service.

Doug is nationally recognized as an expert technical assistance provider and trainer in board governance, mergers and restructuring, strategic planning, social enterprises, risk management, and community planning and is a well-respected policy advocate. He is also skilled in nonprofit governance capacity assessments and customized board matching. Doug is a frequent public speaker and is quoted often in local, statewide and national media. Doug co-founded Council Services Plus, Inc., a for-profit insurance brokerage subsidiary of NYCON, and Innovative Charitable Initiatives, Inc. a nonprofit subsidiary of NYCON that provides fiscal sponsorship, interim leadership, and employment administration services.

Doug is also highly experienced as a board leader. He is currently the Board Chair of Council Services Plus, Inc.; Board Chair of the Good Causes Development Corporation; Treasurer and former Board Chair of the National Council of Nonprofits; Director on the First Nonprofit Unemployment Saving Trust (an AmTrust Financial Company) Board of Directors; and, ex-officio Director on the board of The Baby Institute of Albany. Prior board service includes Secretary and Board Chair of the National Association of Planning Councils, as well as Director on the boards of Salem Art Works, Inc., Grafton Free Library; and the Albany Community Development Credit Union. Doug also was a publically-elected Director on the Berlin Central School District. Additional volunteer leadership service includes a gubernatorial appointment on the NYS Commission on Community Service (AmeriCorps) and appointment by the New York State Attorney General to the Nonprofit Revitalization Leadership Committee. Doug has a MSW in Community Organization from the University of Pittsburgh, a BSW

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from University of Albany, and an AAS in Human Services from Hudson Valley Community College. He served as a medic for four years in the USAF with war time service in Southeast Asia.



Anna Shaferova, CPA, BKD CPAs & Advisors LLP

Anna provides a variety of audit services to not-for-profit organizations and health care providers, including special needs organizations, behavioral health agencies and private schools. She is widely recognized for her extensive knowledge of regulatory and legislative requirements, which allow her to also provide cost report and other consulting services to her clients. In addition, she is familiar with multiple types of employee benefit plan audits as well as Single Audit requirements.

She is a member of the American Institute of CPAs, New York State Society of Certified Public Accountants, American Women's Society of Certified Public

Accountants and Accounting & Financial Women's Alliance.

Anna is a magna cum laude graduate of Baruch College, New York, with a B.B.A. degree in accounting.



James Sheehan, Chief, Charities Bureau at New York State

As the Chief of the Charities Bureau at New York State Department of Law, Mr. Sheehan, who has more than 30 years of high-level experience working as an attorney for the city, state and federal governments, is responsible for the oversight of nonprofit corporations and charitable trusts under several New York State laws. He directs the bureau's affirmative investigations and litigation, its review of sales, mergers and dissolutions of not-for-profits, and its representation of the interests of charitable beneficiaries in trusts and estates matters.



Sheena Solomon, Executive Director, The Gifford Foundation

Sheena E. Solomon is entering her 13th year at the Gifford Foundation, a private foundation serving Central New York where she was named Executive Director January 1st, 2019. Her work at the foundation has been primarily focused on expanding its community impact initiatives, as well as working with the grants management team.

Sheena has partnered and advised with the Health Foundation for Western and Central New York on neighborhood issues and served on the advisory

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committee of The Leadership Classroom, a project of the Central New York Community Foundation. She has been instrumental in the design and planning of Nourishing Tomorrow's Leaders a leadership development training that focuses on increasing the diversity and inclusiveness of nonprofit boards. Sheena is a 2012 graduate of the PLACES (Professionals Learning About Community Equity and Smart Growth) program, a yearlong professional development program designed to explore critical issues that affect grantmaking decisions that are responsive to the needs and assets of low-income neighborhoods and people of color. She now serves as Chair of the PLACES Advisory Board for the program. Sheena also dedicates her time by serving on local boards such as; You Can't Fail Inc, the Syracuse Economic Development Corporation, and The Near Westside Initiative.

Before joining the Foundation, Sheena spent several years working at local non-profit organizations where she developed an understanding and joy for working with people in the community. Sheena was essential in the creation and implementation of Gifford's city-wide initiative, the "What If..." Mini-Grants, which provides a resource in fostering growth in neighborhoods and strengthening the capacity of residents who are focused on making positive changes in their communities.

Sheena is passionate about fostering growth in others. She understands the need to have patience and understanding in addressing the needs of the community. She truly believes the "teaching people how to fish" concept and celebrating diversity is the best way to build and sustain strong vibrant and inclusive communities. In her role as Executive Director, she remains fully committed and engaged in racial justice and equity work.

In her spare time, she enjoys spending time with family and treasuring every moment because tomorrow is promised to no one. She looks forward to continuing her journey of being a confident, calm and courageous leader.



Devin Thorpe, Author, Speaker, Educator, GoodCrowd School

Devin is an author, speaker and educator. He calls himself a champion of social good. As a new-media journalist and founder of the Your Mark on the World Center, Devin has established himself as a champion of social good. As a Forbes contributor, with over 500 bylines and over two million unique readers, he has become a recognized name in the social impact arena. His Your Mark on the World show, featuring over 1,000 celebrities, CEOs, billionaires, entrepreneurs and others who are out to change the world, gives him a recognizable face as well.

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Devin is founder of GoodCrowd.school, school for changemakers. He previously served as an adjunct professor at the University of Utah and South China University of Technology. He is passionate about helping people learn to do good better.

He has helped nonprofits raise millions of dollars via crowdfunding. He hosts an annual 24-hour livestream via YouTube on #GivingTuesday, featuring more than 90 interviews with nonprofits in 2018.

Previously, Devin served as the CFO of the third largest company on the 2009 Inc. 500 list. He also founded and led an NASD-registered investment bank. After completing a degree in finance at the University of Utah, he earned an MBA from Cornell University.

Having lived on three continents and visited over 40 countries on six continents and with guests from around the world on his show, Devin brings a global perspective on purpose driven leadership to international audiences—from the UN to Nepal—empowering them to do more good and make their mark on the world. These lessons also enable them to change their personal lives and to drive positive change within their organizations. His books provide roadmaps to audiences on how to use money for good. His books have been read over 1 million times!

Today, Devin channels the idealism of his youth, volunteering whenever and wherever he can, with the loving support of his wife, Gail. Their son, Dayton, works in San Francisco. Frequently finding himself on airplanes, he is glad to be middle-seat sized.



John D. Trybus, Professor/Storytelling Scientist, Georgetown University

Professor John D. Trybus of Georgetown University is a story scientist on a mission to help change makers around the world create and tell more effective stories that bring their missions and visions to life. He leads Georgetown University's Center for Social Impact Communication in Washington, D.C. where he created and teaches the only academic program in the world focused on social impact storytelling. Prior to academia, John's work spanned sectors in pursuit of making impact. He served as a strategist at the British Embassy, as a social innovation

consultant at Waggener Edstrom Worldwide and as the traveling personal advisor to famous scientist Dr. Jane Goodall. A highly sought after speaker and trainer on the topic of storytelling, he has collaborated with hundreds of groups including NPR, Kresge Foundation, Smithsonian, Knight Foundation, United Way and the Department of Interior. Learn more about his work at www.johntrybus.com.

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Michael West, Esq., Senior Attorney, New York Council of Nonprofits, Inc.

Michael West is the Senior Attorney at the New York Council of Nonprofits, Inc. He has served as a staff attorney with NYCON since 2002 and presently oversees NYCON’s Legal Services Group. Although he has represented clients in all areas of criminal and civil litigation, Mr. West’s practice has long been devoted exclusively to addressing issues concerning tax-exempt, nonprofit organizations, particularly those matters implicating corporate, tax, contract, real property and employment law. He is a recognized and respected advocate, not only for his own nonprofit clients, but for the nonprofit community as a whole, particularly in the State of New York. Mr. West provides a wide variety of legal services to charitable organizations, educational institutions and religious orders. Long-term, diversified professional engagements facilitated by NYCON have enabled him to develop expertise in numerous specialized areas of law unique to nonprofits—from corporate restructuring to property tax-exemption, and worker classification to restricted fund expenditures. Mike is, perhaps, most highly regarded for the innovation, dedication, effort and empathy that he exhibits in defense of nonprofits struggling to address seemingly insurmountable financial, regulatory or public relation predicaments amongst other forms of organizational crisis. He also regularly conducts training sessions for nonprofit boards of directors and executive staff, Continuing Legal Education classes for attorneys and discussions and seminars for the general public concerning charitable organizations, in addition, to offering testimony before legislative and regulatory authorities. Michael West is admitted to the practice of law in the State of New York and is a graduate of Rutgers University and Albany Law School where he was a New York Chief Justice Benjamin N. Cardozo Scholar and served as an Executive Editor with the Albany Law Review.



Minika N. Udoko, JD, Organizational Development Associate/Diversity & Inclusion Manager

Minika was born and raised in Atlanta, Georgia, and is a first generation Nigerian-American. Minika graduated from Brenau University Women’s College in Gainesville, GA with a Bachelor of Arts in History and Political Science. After graduating from college, Minika relocated to New York to pursue her Juris Doctor at Pace University School of Law. Following her graduation from Pace, Minika joined the New York State Bar Association (NYSBA) as Special Projects Lead, from there, she became Manager of Section and Solo-Small Firm Member Outreach, and then Diversity and Inclusion Specialist. As Diversity and Inclusion Specialist, she was responsible for overseeing and facilitating the Association’s efforts to increase diversity and inclusion in the Association and legal profession through educational programming and outreach. In her spare time, Minika enjoys going to the movies and traveling and seeing other places, cultures and countries.