



center for nonprofit  
advancement

# 2023 Nonprofit Agenda

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Main Street





## Dear Community and Nonprofit Sector Stakeholders,

As you turn the remaining pages of this Nonprofit Agenda, we are preparing to kick off our first in-person "Annual" Celebration in over three years. Like many of you, we were called to serve in new and creative ways during the pandemic and forced into a virtual posture. I am delighted to share that we developed new strengths and grew even stronger throughout our communities while meeting the changing needs of nonprofit organizations.



Today marks a new change and a new opportunity. We have the good fortune of being together, networking, learning, and thriving through our collaborative spirit. We have an opportunity to engage philanthropy, corporations, government, nonprofits, and all sectors to accomplish our shared goal of supporting people and communities in need.

On behalf of all of us at the Center for Nonprofit Advancement (the Center), we are grateful to be your trusted source for capacity building, collaboration among organizations, advocacy, management assistance, fiscal partnerships, and efforts to develop a more racially equitable nonprofit sector.

As we reflect on another dynamic year, we celebrate accomplishments realized from your partnership and support, including:

- Record-setting participation in our Executive Preparation Institute (EPI) series, providing senior team members and deputy directors of area nonprofits the training and coaching necessary to increase their capabilities and to assist them in securing chief executive officer roles, when desired.
- National reviews and increased participation in our three-part board basics training for aspiring board members and those confirming best practices. And many successful board matches between trained board member prospects and nonprofits in need of their specific skills and expertise.
- The launch of a first-of-its-kind grants administration and capacity-building partnership with the District of Columbia Department of Parks and Recreation (DPR) to facilitate funding and capacity building for over seventy-five youth-serving nonprofit organizations.
- A groundbreaking funding partnership with JP Morgan Chase & Co. to launch an inaugural cohort of our Chief Executive Leaders Ascend Program (CELAP), with a focus on grantmaking, strengthening individual and organizational capacity, executive coaching, and overall wellness for eight black woman-led nonprofit organizations in the District's Wards 7 and 8.

Through these and all of our accomplishments, we are humbled by the reality that there is much more work to do.

We hope that you are joining our 44th Annual Celebration "in-person", celebrating our Phyllis Campbell Newsome Public Policy Leadership and GRF Excellence in Chief Executive Leadership (EXCEL) award winners and welcoming Melissa Leong, a highly esteemed authority on personal finance, as we recharge and refocus on balance.

During this event, we'll explore the importance of self-care alongside our ongoing dedication to others. Melissa will offer valuable insights into planning for life beyond the present, emphasizing practical steps to secure financial stability for ourselves and our loved ones.

**"You cannot pour from an empty cup" - my grandmother, at least once per week, over and over again.**

On behalf of our Board of Directors and Team, thank you for your continued support and partnership.

Sincerely,





# RETURNING THE JOY TO FUNDRAISING

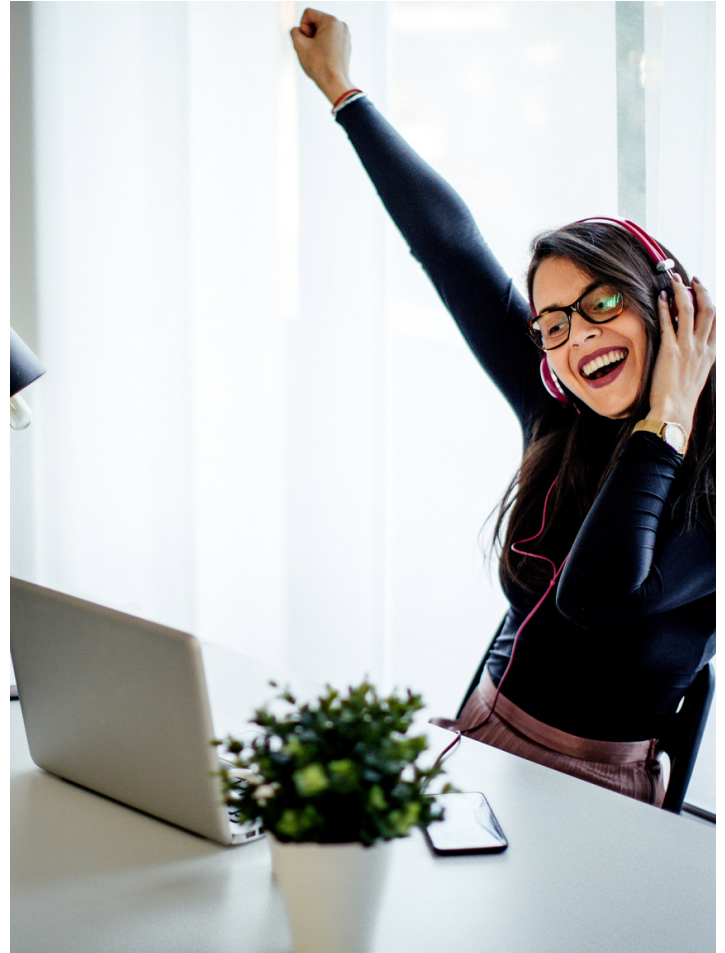
By Scott Jackson,  
President & CEO, Global Impact

Fundraising for our organizations and causes should be joyful, even transformative for both those of us who are responsible for fundraising and for our donors who chose to give. But for the past three years it hasn't always been easy to find the joy. Whether securing unrestricted funds to support our organization's operations, or raising funds for specific programs and projects, there have been many roadblocks to overcome.

On a personal level, some of these roadblocks have at times seemed unsurmountable. COVID-19 brought us an unprecedented health crisis and corresponding economic crisis on a global scale. It also took away our ability to connect in person with family, friends, colleagues, and donors.

The vaccines have brought us hope for a new normal, but we must still contend with the loss of life of family members and friends. We have been confronted with deep-seated racism and prejudice that we must all do our part to stamp out. There have been cultural wars, that will continue. We must all now face the reality of climate change. The war in Ukraine and wars and conflicts around the world continue to take lives.

During the United Nations annual meetings in New York, we were confronted with the reality that we have not made the progress we need to achieve the targets set for the Sustainable Development Goals. For each of us we must not only confront the roadblocks that affect all of us, but we must also navigate on a daily basis how to stay healthy, how to manage the stress of Zoom and Teams calls and still have the energy for in-person connections.



This is all happening in real time not only for us as fundraisers but also for our donors.

Yet there is joy and hope all around us. We have the privilege of helping others see that hope. Our organizations and our mission to serve is more relevant and important than ever. With renewed commitment we can solve or have a positive impact on the causes we fight for as fundraisers and nonprofit leaders. We have the opportunity to be "the other" person and be a positive influence with everyone we come in contact with on a daily basis. We must persevere and lean on each other to be that positive someone in other people's lives.



On a personal level, these are some of the ways I have found to break through the roadblocks and find some of the joy and fun in harnessing philanthropy for good:

## 1 Take care of yourself.

It is not enough to just work more hours, you have to take care of you so that you have more to give to your loved ones and to your work.

## 2 Stay focused.

Stay focused on the mission and don't let everything else around you distract from what you are trying to achieve.

## 3 Have passion for both the cause and the people.

We have to care as much about the people we are in contact with as we do our cause.

## 4 Shine the light.

Be a positive light for your donors, your colleagues, and for the people you serve.

## 5 Do what you can.

Do what you can every day and remember you will have another opportunity tomorrow.

## 6 You are not alone.

Lean on your co-workers, your leadership, your donors. We are in this together and we must remember we have each other.

Fundraisers have a unique gift to help others see what they can become and what they can do to make this a better world, a more humane world in spite of the roadblocks.

There is no greater gift than to be able to help your donors find their own path to transforming their lives and the lives of others. The joy and fun in fundraising will come by each of us bringing our own joy and whole self to those we have the privilege to connect with.

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# SPOTLIGHTING THE MEMBERS WHO'VE BEEN WITH US SINCE THE 80'S



## RAP (Regional Addiction Prevention), Inc.



Founded in 1970, RAP (Regional Addiction Prevention), Inc. is a not-for-profit health care and human welfare agency specializing in residential substance abuse treatment; HIV/AIDS care; emergency and transitional housing; nutritional counseling; and out-patient primary medical care. Residents and clients are adult male and female District of Columbia residents. RAP's overarching mission is to promote and enhance human health - physically, spiritually, emotionally and socially. Individualized intensive and comprehensive assessment and case management guarantee an all-inclusive care plan.

## National Consumer Voice for Quality Long-Term Care



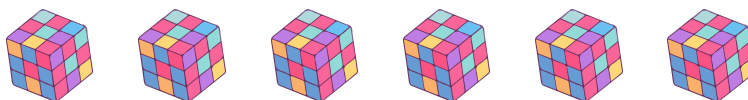
The National Consumer Voice for Quality Long-Term Care emerged due to widespread concerns about inadequate nursing home care. It evolved from the efforts of advocates associated with Ralph Nader and the National Gray Panthers, particularly Elma Holder, who convened a group of activists from different regions at a nursing home industry conference in Washington, DC. There, 12 citizen action groups collectively addressed the industry, highlighting the urgent need for nursing home reforms.



## Council for Court Excellence



Founded in 1982, the Council for Court Excellence (CCE) is a nonprofit, nonpartisan civic organization that envisions a justice system in the District of Columbia that equitably serves its people. CCE identifies and proposes solutions by collaborating with diverse stakeholders to conduct research, advance policy, educate the public, and increase civic engagement.







## Potomac Appalachian Trail Club

Founded in 1927, the Potomac Appalachian Trail Club (PATC) is an organization maintaining a significant section of the Appalachian Trail and over 650 miles of other trails across Virginia, West Virginia, Maryland, Pennsylvania, and Washington, DC. With over 8,000 members and 1,000 volunteers, PATC also manages rental cabins, shelters, and related lands.

## Association of Independent Schools of Greater Washington



The Association of Independent Schools of Greater Washington (AISGW), established in 1951, supports over 78 independent schools in the D.C. region. It promotes professional standards, networking, and advocacy, offering various resources and guidelines to ensure fair and just practices within member schools' admissions and operations.

**AISGW** | The Association of Independent Schools of Greater Washington



## Center on Conscience & War

The Center on Conscience & War (CCW) aids conscientious objectors in the military and beyond, opposing conscription. Founded in 1940 as NISBCO, it also supports youth, US citizenship seekers, and international objectors, offering free services including draft assistance and alternative service programs.



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# Facing Uncertainty: The Power of a Robust Fundraising Plan

BY SPARK POINT  
FUNDRAISING

Navigating uncertain times in the nonprofit sector, especially during transitions and evolving economic or political shifts, can be daunting. The pandemic's impact on funding availability has placed strain on nonprofit development teams, hindering their ability to achieve programmatic goals, expand staff, address community needs, and serve clients.

It's akin to navigating a storm,

but it doesn't have to be nerve-racking. Establishing a robust fundraising strategy can help ease this process and embrace uncertainty through key steps.

## A Clear Organizational Plan and United Front

In times of unpredictability, clarity can feel elusive. Having a strong plan in place can unite nonprofit staff around a common goal and alleviate the stress that comes with change. It provides clear expectations for roles, responsibilities, and organizational direction -- reinforcing the sense of collective effort.

Clarity fosters collaboration, making team members feel valued and supported.

Ultimately, having clearly defined goals and roles enhances team members' sense of security within the organization, allowing them to stand together regardless of the uncertainty's outcome.



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## *Reduce Stress, Elevate Funding*

A clear and robust fundraising plan promotes team cohesion and team building, reducing stress during transitional periods. Once the team is on the same page with vision and goals, the focus shifts to implementation. A well-defined plan moves the focus from stress to action. Team members can concentrate on building a funding reservoir -- creating a financial safety net that alleviates uncertainty -- allowing staff to focus on their essential work: addressing community needs and serving clients.

## *A Clear Organizational Plan and United Front*

Building long-term organizational sustainability starts with strategic fundraising goals. To ensure continued mission fulfillment amidst unpredictability, diversify your revenue streams. Relying on a single income source is risky; spreading fundraising efforts across multiple channels provides greater financial stability.

While you don't need to chase every funding opportunity, you should identify and pursue the most suitable options for your organization. Ensure you have a diverse group of funding sources to fuel your mission.

In the midst of change, a formidable approach to fundraising serves as a beacon of hope, alleviating stress and providing a clear direction.

With a well-structured plan and collaborative effort, nonprofit teams gain the confidence to face uncertainty head-on. Team members feel supported in tackling emerging challenges and maximizing potential revenue sources to meet community needs. Embracing change with a tactful plan of action and a united team behind you allows you to approach uncertain periods with clarity and secure the sustainability of your nonprofit.

In your pursuit of embracing change and establishing a robust fundraising strategy - contact us at <https://www.sparkpoint.com/contact/>





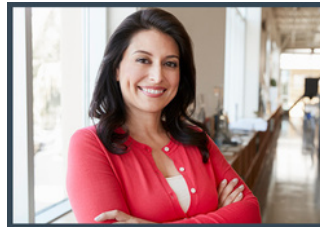
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# Time Hacks



## FOR NONPROFIT PROFESSIONALS

### Boost Productivity and Balance Your Life

(Insights from **Brian Nelson-Palmer**, the Productivity Gladiator)

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#### **In the fast-paced world of the nonprofit sector, time is often an invaluable resource.**

Each team frequently juggles multiple responsibilities, from fundraising to program management, and every minute counts. Maximizing time efficiency is crucial not only for enhancing productivity but also for shaping nonprofit work culture. Here, we venture into a realm of innovative time hacks, crafted for the discerning eyes of program associates and CEOs alike, with the aim of fostering a more harmonious equilibrium between work and life.

#### *1. Dictation: The Key to Boosting Efficiency*

In a world that demands speed and the kind of creativity and innovation only a rested mind can generate, a game-changing technique is here: dictation. It's three times faster than typing and eases strain on your body. Imagine speaking at 120-150 words per minute, effortlessly crafting emails, blogs, and more. Dictation offers a host of benefits:

- **Physical Relief:** Minimize strain on wrists, back, and more.
- **Multitasking Made Easy:** Be productive during walks or downtime.
- **Stress Reduction:** Speak your thoughts freely, easing your mind.
- **Effortless Brain Dumping:** Unload ideas quickly onto the screen.

#### *2. Simplify Mornings for a Balanced Day*

The way you start your day can set the tone for the hours that follow. Consider incorporating these time-saving morning hacks to better streamline your morning routine and significantly reduce stress:

- **Prep Ahead:** Plan and pack the night before. Lay out your clothes, gather work essentials, and prepare your breakfast and lunch. This not only conserves valuable morning time but also alleviates decision fatigue, fostering a more creative mindset.
- **Delegate Morning Tasks:** Identify areas where your family and support system can assist in preparing for the day. Even those with young children can find ways for them to contribute, such as teaching them to feed the dog breakfast or involving them in other manageable tasks.
- **Embrace Checklists:** Create a checklist for the morning, including tasks, items to pack, and anything else you need to remember. This will help you stay organized and ensure you don't forget important details.
- **Utilize technology:** Explore the use of smart home devices to automate certain morning tasks, such as adjusting the thermostat or brewing coffee, for a smoother start to your day.

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## 3. Elevate Your Commute

The nonprofit sector is no different than many other sectors in how we often spend a considerable amount of time commuting to and from work. Instead of viewing your commute as lost time, consider it an opportunity for productivity and personal growth. Here are some strategies to elevate your commute:

- **Vary Your Commute:** Experiment with alternative modes of transportation, such as walking, cycling, or public transit. A change in routine can lead to increased satisfaction and well-being.
- **Work from Home:** Whenever possible, consider working from home. Even one day a week can save valuable time and eliminate the stress of a daily commute.
- **Opt for Public Transport:** Use public transportation as an opportunity for personal growth. Read, listen to audiobooks or podcasts, learn something new, catch up on emails, or start a journal. Make the most of your travel time.
- **Set Boundaries:** However you decide to use your time commuting, communicate your preferences to your colleagues and family to prevent disruptions and protect the energy you need to reserve for the day ahead.

## 4. Calculate the Value of Your Time.

Time seems to slip away, leaving us wishing for more hours in the day. Understanding how you allocate your time can significantly enhance your productivity. Incorporating the worth of your time in your planning process can be transformative when striving for balance between work and personal life.

### Have you ever found yourself spending hours on a task only to realize it took far too long to complete?

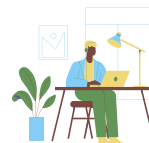
Whether it's a work-related email or a home DIY project, these instances can result in precious time lost.

Find out the value of your time: head over to Productivity Gladiator, where they have a calculator to help you estimate your own figures.

Ask yourself:

- Is it worth taking the \$4 bus for a 40-minute commute or spending \$20 on a 10-minute Uber ride?
- Should I pay \$150 for someone to fix the toilet or spend 2 hours doing it myself?
- Does a survey for a \$1 coupon off my next purchase justify my time?

While some scenarios involve more than just the monetary aspect, considering what your time is worth can simplify decision-making in many cases.







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# THE IMPORTANCE OF BUILDING A COMPREHENSIVE EMPLOYEE BENEFITS PACKAGE



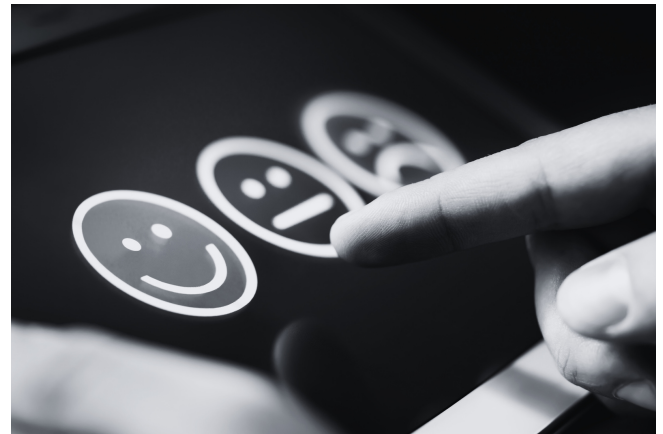
By Ellie Shippey

Communications Associate, *The Center for Nonprofit Advancement*

In today's competitive job market, the ability to attract and retain top talent is paramount for any organization, including nonprofits. Nonprofit professionals play a pivotal role in addressing the pressing social issues of our time, from poverty and homelessness to education and healthcare disparities. To tackle these challenges effectively, nonprofits need a dedicated and motivated workforce. One key strategy for attracting and keeping talented individuals committed to your mission is by offering a comprehensive employee benefits package.

## Attracting Top Talent

In a region as competitive as Washington DC, nonprofits often find themselves vying for the same pool of skilled professionals. A robust benefits package can make the difference in recruiting the best candidates. According to a recent report by the Society for Human Resource Management (SHRM), 82% of surveyed employees consider benefits packages a key factor in their decision to accept or reject job offers.



## Retention and Employee Satisfaction

**Once you've attracted talented individuals to your nonprofit, the next step is keeping them engaged and satisfied.**

A comprehensive benefits package, including health insurance, retirement plans, and professional development opportunities, demonstrates your commitment to their long-term success. This fosters a sense of loyalty and belonging, reducing turnover and the associated costs of recruitment and training.

According to a study by the Employee Benefit Research Institute (EBRI), companies that provide strong benefits packages report an average employee turnover rate 15% lower than those that do not. This saves resources and enhances the stability and continuity of your nonprofit's programs.



**But it's not just about reducing numbers on a spreadsheet.** It's about recognizing that financial wellness impacts personal wellness. When employees have access to quality healthcare, they can address health concerns promptly, reducing stress and increasing overall well-being. When they have retirement plans, they can envision a secure future, which in turn positively influences their mental and emotional health.

## Boosting Productivity and Engagement

Employees who feel secure and valued are more likely to be engaged and productive. By providing benefits such as wellness programs, mental health support, and work-life balance initiatives, nonprofits can create a positive work environment that encourages employees to give their best effort every day.

Imagine the impact on your organization when your employees are not burdened by financial stress.

Their focus can shift from worrying about bills to wholeheartedly committing to the mission. A recent Gallup poll found that engaged employees are 21% more productive than their disengaged counterparts.

## Supporting the Mission

The nonprofit's mission is at the heart of everything you do. A strong benefits package not only supports your employees but also aligns with your organization's goals. It can help attract individuals who are passionate about the mission, creating a team that is not only skilled but also deeply committed to the cause.

The importance of building a comprehensive employee benefits package cannot be overstated. It is an investment in your organization's most valuable asset: your people. By offering competitive benefits, you will attract, retain and motivate the talent needed to drive your nonprofit's mission forward.



# LEVERAGING *AI* FOR IMPROVED PRODUCTIVITY.

BY AMY SAMPLE WARD  
CEO, NTEN

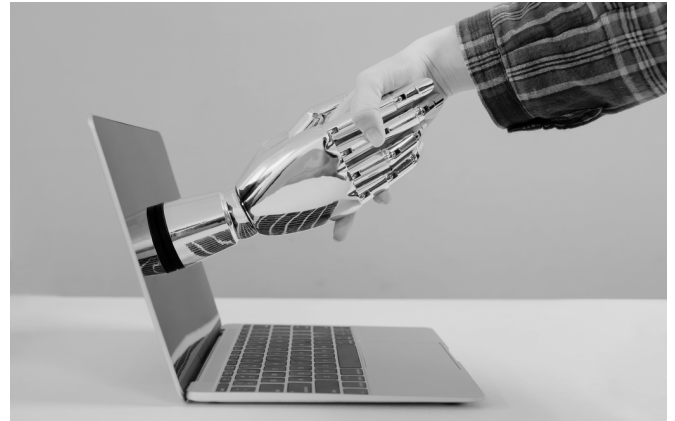
Articles about artificial intelligence have been everywhere the last few months. You've probably seen commentary from positive and enthusiastic voices urging everyone to adopt these new tools as quickly as they can; and maybe you've also heard cautious tales about what it has looked like when organizations adopted quickly. Or, you may have even seen some of the extreme claims that AI would replace all of our jobs or all of our content.

As with anything, the place to focus our attention is somewhere in the middle of all of this:

## ***Where do the most positive and most critical overlap?***

AI tools will impact content and jobs in some ways, and there are some opportunities now for organizations already looking to adopt AI but more opportunities will come later, too. I think the most important note is to turn down the urgency.

We are, as nonprofit staff and leaders, pushed by vendors and funders all the time to believe that other priorities are our priorities, that redirecting our attention is urgent and important. Do not worry: staying focused on your community, your staff, and our mission is the only priority that is needed. And, as you'll see below, is key to identifying if, how, or when AI and machine learning technologies actually are appropriate for your work.



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Obviously, with so very many demands on our services and programs, productivity and efficiency are of key focus for many of us. And using this as an entry point for thinking about the use of AI is a great way to already avoid some of the biggest areas of harm (like replacing human help center staff with a chatbot that offers harmful advice to clients). Here are a few areas where efficiency-focused tools could be considered in your work:

## PROMPT SERVICE OR STAFF INTERVENTION

Using data from your database, you can build automations that notify a staff person to follow up with a client or community member when certain criteria are met, like two missed appointments or incomplete program participation. Instead of staff manually reviewing every client's record or participation history, these automations can track the data that is most relevant and notify staff when the criteria are met. This keeps staff focused on the constituents who need support and frees up their time from doing repetitive and manual data tracking.

## JUMPSTART LEARNING

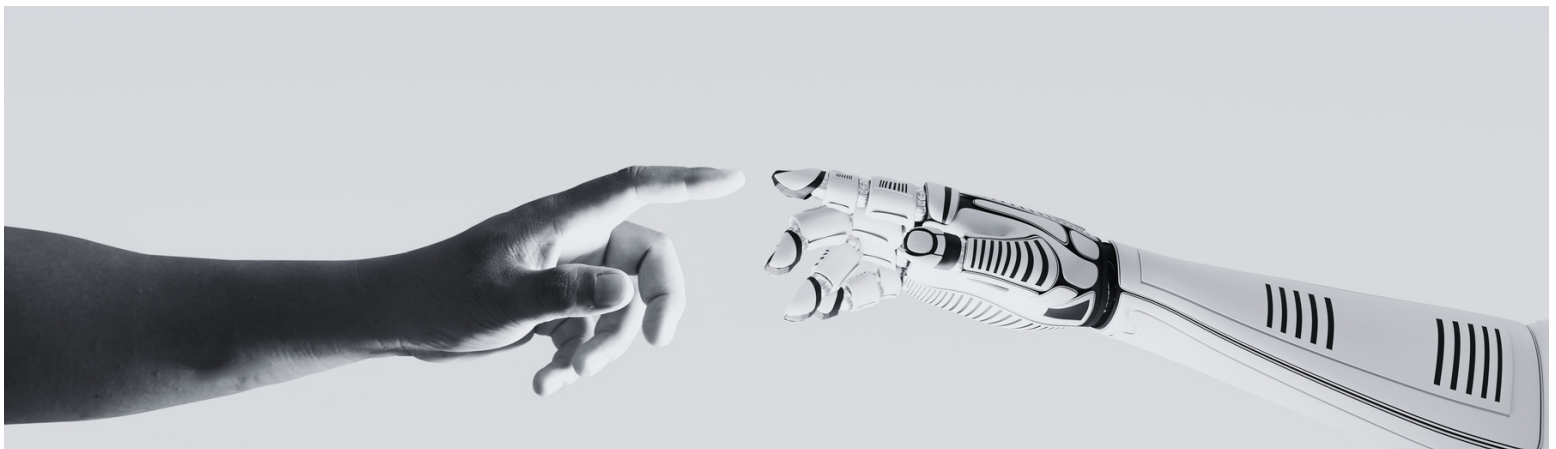
Just as using search engines effectively has required that we as users are skillful with our asks or requests that we put in and then thoughtful in evaluating the results, using now popular AI tools like ChatGPT effectively requires intentional prompts and critical review of the results. One way to explore ChatGPT is to approach similarly to a search engine: ask for a collection of recent news articles impacting your community or for reports that have published data related to your mission area. Instead of asking for and using the analysis of ChatGPT, use it to jumpstart your research so you can learn and evaluate content with your thoughtful perspective instead of spending your time trying to find the articles to begin with.

**No matter which tools you may try or models for analysis and automation you build internally, keep these three guiding points in mind:**

1. **Start with your values:** Your mission isn't to adopt every new tool that comes out. Use your values to inform decision making and evaluation of opportunities that come up, and make sure your community and your mission are central to technology investments.
2. **Keep decisions with people:** AI tools may be helpful to individual staff or the organization as a whole, but what they cannot replace is decision making. Even if technologies support staff in those decisions, tech tools should not be given the role to decide and act.
3. **Be mindful of bias:** Many issues with publicly available tools like ChatGPT that have been trained on large swaths of data from the internet are rooted in the bias inherent in the data and algorithm that allowed for that learning. It is important to be mindful of the limitations of these tools because of bias so that you can intentionally supplement or adjust to address it. Similarly, datasets in your own organization likely have bias and building models or analysis from your organization's data systems also need thoughtful review.

More than anything, know that these technologies, like so many waves of new tech we've already experienced and those that are to come, are opportunities but not requirements. If and when they have a role in service to your mission, you can adopt them. But do not worry your mission must bend to these new tools.

**Your mission is always first.**



# SPOTLIGHTING NONPROFIT STARS

...and sharing lessons learned from their ascent to greatness

The Center highlights exceptional endeavors and best practices through its award competitions, affirming **visionary leadership** in the region. Selection committees, comprising of esteemed figures from various sectors, volunteer their time to review nominations, conduct site visits, and contribute to the selection process.

**The Center thanks everyone who helped make our 2023 Award Competitions successful—including all the nonprofits that participated, the selection committee members and our generous sponsors.**

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## Phyllis Campbell Newsome Public Policy Leadership Award

The **PCN Award** was created to highlight the work of elected and non-elected officials who have gone above and beyond in partnership with the nonprofit sector to ensure more vibrant communities. Each year, the Center honors four public officials, one from each jurisdiction in our region: the District of Columbia, Northern Virginia, and Montgomery and Prince George's Counties.



### ***Congratulations to our 2023 winners!***



***Washington, DC***

**Janeese Lewis George**

Councilmember, Ward 4



***Montgomery County***

**Gabe Albornoz**

Councilmember-At-Large



***Prince George's County***

**Aisha Braveboy**

State's Attorney



***Virginia***

**Karla Bruce**

Chief Equity Officer for Fairfax County



# Board Leadership 2023 Award

This annual award recognizes the essential role boards play in building and sustaining a thriving nonprofit. By executing their fiduciary and leadership responsibilities, board members ensure their nonprofits are managed effectively, well-funded, and responsive to the people and communities they serve.

## Congratulations to this year's leading Boards!



Out Teach is a national education non-profit built to inspire and prepare today's elementary students to become the next generation of fearless innovators. They are creating a world where every student—regardless of learning ability, race, zip code, gender, or access to resources—can step into the wonder of science.

## And kudos to our 2023 Honorable Mention!

Founded in 2012, The Network for Victim Recovery of DC (NVRDC) is an organization dedicated to providing support and services to crime victims in Washington, DC.



nvrdc

Network for Victim Recovery of DC

Their mission is to empower victims of all crimes through advocacy, case management, and legal services.

## Sharing Best Practices

The Board Leadership Award also provides an opportunity for all of us to learn from successful boards through our Best Practices video shorts. This year we featured **Onboarding and Board Development**, **Strategic Planning**, and **Moving from a Working Board to a Strategic One**. The series includes interviews with leaders from both our award winner and honorable mention.

Videos were released in August and are now available to watch on demand.

Visit the Center's website to learn more.



## Special thanks to

### Cohn Reznick

for their generous contribution as our presenting sponsor

### Selection Committee

for volunteering many hours of their time

### Edith Bullard

Chief Communications Officer, ACLU of Virginia

### Tom Colling

Manager of Administration and Grants, MCAEL

### Marguerete Luter

The Process Pro, LLC

### Jason Qu

Managing Attorney, D.C. Bar Pro Bono Center

### Larry Robertson

Owner, Larry Robertson Consulting

### Pam Saussy

Board Chair, FOLMC

### Kris Thompson

Chief Executive Officer, Calvary Women's Services

### Cheryl Williams

Executive Director, National Association for State Community Services Programs

### Participating Members

### Anne E Schrantz

Principal, CohnReznick

### Joy Folkedal

Senior Manager of Governance and Education. BoardSource

### Administrators

Center for Nonprofit Advancement

### Aziza Rush

Operations Coordinator

### Taylor Strange

Chief Operating Officer

### Sean Sweeney

Director of Education and Programs

# EXCELLENCE IN CHIEF EXECUTIVE LEADERSHIP



Since 2005, the Center has recognized outstanding nonprofit leaders in our region with the EXCEL Award. This annual competition spotlights inspiring individuals who have successfully led their nonprofits with innovation, ethical integrity, motivation and strategic vision.

## **Congratulations to our 2023 winner!**

### **Ari Brooks**

*Executive Director,  
Friends of the Library, Montgomery County*

Ari Z. Brooks boasts extensive expertise as a fundraiser and nonprofit manager, having occupied leadership roles in three nonprofit organizations for over twenty-five years across Maryland and Pennsylvania. As FOLMC executive director, Ari leads one of the largest Friends groups in the DC region.



## **And kudos to our 2023 Honorable Mentions!**



### **Gabby Mulnick Majewski**

*Executive Director  
DC Affordable Law Firm*

With over 15 years in Washington, D.C.'s public interest legal arena, Gabby is committed to fortifying services for underserved families. Her instrumental role on the BEST Kids Board reflects her diverse skill set, providing strategic leadership, insightful guidance, and robust fundraising support for the organization's vital endeavors.

### **Dr. Donney John**

*Executive Director  
NOVA ScriptsCentral*

Dr. John, a committed healthcare executive and nonprofit leader, focuses on pioneering innovative strategies to improve health outcomes. His broad expertise spans various healthcare sectors, driving impactful change in underserved communities and earning recognition as a National Minority Quality Forum "40 Under 40" honoree.



## **2023 EXCEL BEST PRACTICES VIDEO SHORTS COMING IN DECEMBER!**



Our 2023 EXCEL winner and honorable mentions will share how they spearheaded significant changes and overcame obstacles in their organizations.

## **Special thanks to**

### **GRF CPAs & Advisors**

for their generous contribution as our  
presenting sponsor

### **Selection Committee**

for volunteering many hours of their time

Jacqueline Bryant  
CPA Partner, RSM US LLP

Amma Felix  
President, Collegiate Directions, Inc.

Michael Freedman  
Founder, Freedman Advisory Services, LLC

Heidi Gider  
Senior Director of Development, Young Invincibles

Ariel Goldin  
Director of Client Relations, Goldin Group LLC

Carol Hamilton  
Principal, Grace Social Sector Consulting

Marla Lahat  
Executive Director, Home Care Partners

Caroline Santos  
Operations Manager, Spark Point

Danielle Schmutz  
Chief of Staff, Surgo Foundation

Brigitte Winter  
Executive Director, Young Playwrights' Theater

Leslie Zeid  
Partner Aprio

### **Participating Members**

Ian Shuman  
GRF CPAs & Advisors

### **Administrators**

Center for Nonprofit Advancement

Elisha Hardy  
VitalHealth Manager

Sean Sweeney  
Director of Education and Programs

# A YEAR IN Review

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3

*Planning.  
Protecting.  
Prospering.*

## Empowering Our Communities

Our member organizations touch the lives of countless adults, children, and families throughout our region, and in some cases, throughout the nation and the world. Mission areas served by Center members include:

- Advocacy
- Arts, Culture & Humanities
- Education
- Environment
- Health & Nutrition
- Homelessness
- Legal/professional
- Philanthropy

In the ever-evolving landscape of 2023, marked by unprecedented socio-political shifts, our Center members have exhibited unwavering determination and adaptability in the face of complex challenges. Your steadfast commitment has fortified our communities, serving as a beacon of strength and progress. Rest assured, we remain dedicated to bolstering your impactful endeavors.

## Welcoming new members

Over the past year, the Center extended a warm welcome to 39 new nonprofit members. Their choice to join, along with the renewal of existing organizations, reaffirms the strength found in our collaborative efforts.

In a year rife with persistent challenges, nonprofits have sought the Center for expert guidance, tools, and resources to fortify their sustainability and mission fulfillment. Your trust serves as the bedrock of our dedication to nurturing a resilient nonprofit sector capable of weathering socio-economic turbulence and achieving ever-greater milestones.

## VitalHealth

200 member organizations served, over 2465 lives insured

A key member benefit offered since 1984, VitalHealth makes it possible for Center member organizations to provide their staffs with access to affordable medical coverage—including dental, vision and life insurance.

### Fitness Challenges



In 2023, VitalHealth partnered with Reaction to provide a fitness and wellness challenge to those who signed up in the Reaction app. The Me vs. Me challenge centered on step counts, with 48 Center Members staying active and engaging within the app, posting their accomplishments and cheering folks on.

## Facilitating Opportunities to Succeed

The Center organizes a series of hands-on, engaging classes each month, aiming to share practical insights and the most up-to-date strategies for effectively managing various aspects of nonprofit operations. These sessions cover diverse topics, ranging from focusing online content for short attention spans to bridging the gap between development and finance, among others.

This past year the Center provided 73 classes and events for more than 1,551 participants—and counting!



Moreover, we offer two comprehensive training programs. The **Executive Preparation Institute (EPI)** aims to expand the cadre of competent and effective leaders by equipping senior-level nonprofit professionals with comprehensive knowledge of the chief executive position. Our **Board Basics A to Z** program assists nonprofits in cultivating dedicated and accomplished boards by educating new, existing, and prospective members about the expectations and duties associated with this fulfilling role. Such is the popularity of this course that we have introduced an additional course, **Board Basics Part 2**.

## Supporting Nonprofit Growth through Fiscal Sponsorship

For early-stage nonprofits, fiscal sponsorship allows leaders to concentrate on programming and implementation, fostering organizational growth. The Center collaborates with leadership to enhance the organization's capacity through initiatives such as board development, executive coaching, technical support, assessments, evaluations, and strategic planning. Our team oversees compliance, fiduciary responsibilities, and financial management, guaranteeing that organizations have the necessary tools and resources to obtain their IRS exempt status within three years and thrive in the sector.

### The Center is currently working with:

Creative Solutions 4 Youth (CS4Y)  
Love More Movement  
Roll On! Productions, LLC  
The Parks Main Street (TPMS)

## Pursuing equity

In 2023, the Center continued its “I Am The Change” series, honoring diversity recognition months and reflecting on the historical figures and events that have advanced progress and laid the groundwork for ongoing efforts today. We also committed to offering trainings with DEIJ related themes free of charge.

We held our **5th Change Makers Panel Discussion** in October, in which key leaders of color shared their expertise, journeys, strategies and vision. This panel showcased the impactful endeavors of black women-led nonprofits operating in Wards 7 and 8, and stressed the necessity for grant processes to prioritize the well-being of community leaders and sustainable funding models.

## Exploring new ways to share insights

Throughout this year, the Center actively pursued new avenues for sharing insights and fostering growth within the mission-driven sector. Notably, our partnership with **CCS Fundraising** and **K&L Gates** facilitated a dynamic discussion centered on the findings of the Giving USA 2023 report, shedding light on key challenges and opportunities in charitable giving. Additionally, we shared a blog piece exploring the ways Barbie Movie provided valuable guidance tailored to nonprofit professionals, underlining the significance of self-care and the role of rest in fostering resilience.

Our commitment to exploring inventive methods of disseminating insights remains fundamental to our goal of enriching member engagement and services.

## Get Centered with BINGO

We had a great time with everyone who joined us virtually in March for our 4th annual Get Centered with Bingo.

The event enabled participants to evaluate their organizations' crisis response against experts' Expert tips, awesome prizes, and an hour of fun recommendations, while also playing to win prizes. Contestants joined us for three lively rounds of virtual bingo! Amazing prizes—including AirPods, IT support, personal tax consultation, a Dell Latitude Laptop, and Amazon gift cards—were provided by our five sponsors: **Lenserf & Co., Goldin Group, Nonstop Health, Simple IT Care, and UST.**

# Thank You

## Center Board Members

Chair, **Dr. Sylisa Lambert-Woodard**, Pathway Homes  
Vice Chair, **Karen Williamson**, KEW Consulting  
Secretary, **Wayne Gibson**, FTI Consulting  
Treasurer, **Ricardo Trujillo CPA, CITP, CISA**, GRF CPAs & Advisors  
**Lupi Quinteros-Grady**, Latin American Youth Center  
**Kevin Hinton**, Beacon House  
**Darryl Maxwell**, D.C. Bar Pro Bono Center  
**Michael Pasterick**, Aon  
**Margarita Rozenfeld**, Incite International  
**Roberto Terrell**, MS, CPA, RSM US LLP  
**Jane E. Thompson**, Financial Management Consultant  
**Victor Valentine**, National Human Services Assembly  
**LaJuana Warren**, Guest Services

## Center Supporters and Partners

CohnReznick | Crimsonbridge Foundation | DSLBD  
Department of Small Local Business Development |  
DYRS Department of Youth Rehabilitation Services |  
GRF CPAs and Advisors | Humanities DC |  
JPMorgan Chase | ServeDC Mayor's Office on  
Volunteerism | Community Foundation | The Morris  
& Gwendolyn Cafritz Foundation | UST

## Center Industry Experts

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Consulting | Aprio (formerly Aronson) | Berns  
Consulting | BMD Professional Consulting CPAs |  
Brighter Strategies | Citrin Cooperman | Dragonfly  
Central, Inc. | Elevate | Flax Associates | Good  
Insight | Han Group LLC | JFW Accounting  
Services LLC CPA | MJ Consulting Group | Rogers  
& Company PLLC | The Capital Group | The Magi  
Group | Windmill Hill Consulting | Withum

## Center Volunteer Faculty

Kim Alfonso, Result One, LLC  
Swafia Ames, Brighter Strategies  
Tori Beckman, HIGOL  
Flannery Berg, FMA  
Maria Carrasquillo, MJH Consulting  
Christy Cole, Arlington Community Foundation  
Jen Dalton, Brand Mirror  
Alfreda Edwards, Edwards Consulting Services  
Robyn Ellis, Crimsonbridge Foundation  
Lewis Flax, Flax Associates  
Ariel Goldin, Goldin Group  
Mike Gellman, Fiscal Strategies 4 Nonprofits  
Carol Hamilton, Grace Social Sector  
DeaRonda Harrison, June First Firm  
Bethany Henderson, Compass Pro Bono  
Britt Hogue, The Collective Good  
Scott Jackson, Global Impact  
Becky Jascoviak, RBW Strategy  
Barbra Kavanaugh, Brighter Strategies  
Sergei Khadjiev, Goldin Group  
Emma Kieran, Pilot Peak Consulting  
Calvin Koon-Stack, SparkPoint Fundraising  
Ryane LaCesne, Inspire Brand Coaching  
Erin Lau, Good Insight  
Stefanie Lomax, HR Pro 4 You  
Carlyn Madden, Good Insight  
Payal Martin, Brighter Strategies  
Paul McFadden, Zero Point Leadership  
Carole Melvin, Your Part-Time Controller  
Brian Nelson-Palmer, Productivity Gladiator  
Fiona Oliphant, Healing Equity United  
Barbara O'Reilly, Windmill Hill Consulting  
Doug Palmer, Palmer Financial  
Peter Panepento, Turn Two Communications  
Michela Perrone, MMP Associates  
Paul Prezzioti, Johnson Lambert  
Jason Qu, DC Bar Pro Bono Center  
Courtney Reeve, Fine Point Consultants  
Larry Robertson, Consultant  
Will Schermerhorn, AtomStream Communications  
Anne Schrantz, CohnReznick  
Elizabeth Scott, Brighter Strategies  
Ian Shuman, GRF CPAs & Advisors  
Alex Suchman, Brighter Strategies  
Rebecca Teaff, Redstart Creative  
Don Tebbe, Strategic Planning and Succession  
Planning Consultant  
LaJuana Warren, Tapestry Solutions for Inclusion  
Rachel Werner, RBW Strategy  
Meico Whitlock, Mindful Techie