



*Bayer Center for
Nonprofit Management*

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Spring 2003 Courses

Spring 2003 Courses

Collaboration
Executive Transitions
Finance
Fund Development
Leadership Skills
Marketing and Communications
Technology

The Bayer Center for Nonprofit Management
at Robert Morris University

ABOUT THE BAYER CENTER FOR NONPROFIT MANAGEMENT

The Bayer Center for Nonprofit Management at Robert Morris University was founded in 1999 to provide the necessary tools for nonprofit organizations to effectively manage and compete in today's society. The Bayer Center works with clients to assure that the money invested from public and private sources is efficiently and effectively spent to advance their charitable missions. The Bayer Center offers consulting services in areas such as:

- Board development
- Business planning
- Collaboration and alliances
- Database development and enhancement
- Financial management
- Fund development
- Organizational effectiveness
- Technology planning

The Bayer Center also offers workshops presented by national experts on collaboration, technology, innovative financing, human resources, executive transitions and various management issues. The Bayer Center currently offers a master's degree in nonprofit management and a variety of certificate programs; provides information and referral services; conducts applied research; and serves to convene in-depth discussions on the problems of society addressed by nonprofit organizations.

ABOUT THE TECHNOLOGY INITIATIVE AT THE BAYER CENTER

In addition to our educational offerings, the Bayer Center provides a variety of services to help nonprofits effectively integrate technology into their quality service delivery and daily administration. From brief encounters such as information and referral services to short engagements such as a technology assessment through long-term consulting on technology planning and databases, Bayer Center staff is here to help identify mission-appropriate uses of technology. Call 412-227-6814 or visit www.rmu.edu/bcnm to find out more about the resources available.

TABLE OF CONTENTS

Spring 2003 Course Calendar	2
Collaboration	4
Collaboration Series	4
Executive Transitions	4
Executive Transitions Series	4
Finance	5
Finance as a Second Language	5
Fund Development	6
Creating Effective Proposals with Microsoft Word	6
Grantsmanship Center Training	6
Innovative Financing 101	6
Innovative Financing 201: An Executive Leadership Forum	7
Leadership Skills	7
Choosing the Right Consultant	7
Skills for Today's Leaders	8
Thriving as an Executive Director	8
Marketing and Communications	8
Marketing in the Digital Age	8
Technology and Communications	9
Technology	9
Technology 101	9
Technology 201	10
Access Queries A to Z	10
Advanced QuickBooks	10
How to Manage Your Client Information Using Microsoft Access	11
How to Manage Your Mailing List Using Microsoft Access	11
Complying with HIPAA Security Regulations	11
HIPAA Security Regulations Study Group	11
Upcoming Events	12
Instructors	12
Registration Form	15
Registration Information	inside back cover

JANUARY

Monday	Tuesday	Wednesday	Thursday	Friday
		Executive Transition Series		
6	7	8	9	10
Grantsmanship Center Training	Grantsmanship Center Training	Grantsmanship Center Training	Grantsmanship Center Training	Grantsmanship Center Training
13	14	15	16	17
	Complying with HIPAA Security Regulations			
20	21	22	23	24
		Tech 101	How to Manage Your Mailing List Using Access	Skills for Today's Leaders
27	28	29	30	31

FEBRUARY

		Creating Effective Proposals With Microsoft Word	How to Manage Your Mailing List Using Access	Skills for Today's Leaders
3	4	5	6	7
		Tech 101 Executive Transition Series	How to Manage Your Mailing List Using Access	Skills for Today's Leaders
10	11	12	13	14
		Creating Effective Proposals With Microsoft Word	Innovative Financing 201	
17	18	19	20	21
	Collaboration Series	How to Manage Your Mailing List Using Access	Marketing in the Digital Age	Skills for Today's Leaders
24	25	26	27	28
	HIPAA Study Group	Tech 101	Access Queries A to Z	Choosing the Right Consultant
	Innovative Financing 101	Creating Effective Proposals With Microsoft Word	Innovative Financing 201	

MARCH

	Innovative Financing 101		Access Queries A to Z	Marketing in the Digital Age
3	4	5	6	7
	HIPAA Study Group	Tech 101	Access Queries A to Z	
10	11	12	13	14
	Thriving as an Executive Director	Collaboration Series	Tech 201	
	Innovative Financing 101	Innovative Financing 201		
17	18	19	20	21
	Innovative Financing 101	How to Manage Your Client Information Using Access	Tech 201	Marketing in the Digital Age
		Innovative Financing 201		
24	25	26	27	28
	HIPAA Study Group	How to Manage Your Client Information Using Access		
	Innovative Financing 101			

APRIL

Monday	Tuesday	Wednesday	Thursday	Friday
	Innovative Financing 101	Collaboration Series		Marketing in the Digital Age
		How to Manage Your Client Information Using Access		
	1	2	3	4
	HIPAA Study Group	How to Manage Your Client Information Using Access	Executive Transition Series	
7	8	9	10	11
	Innovative Financing 101		Tech 201	
14	15	16	17	18
				<i>Good Friday</i>
	HIPAA Study Group	Finance as a Second Language	Tech 201	
21	22	23	24	25
	Innovative Financing 101	Advanced Quickbooks		
28	29	30		
		Collaboration Series		
		Advanced Quickbooks		

MAY

			Technology and Communications	
			1	2
	HIPAA Study Group	Finance as a Second Language	Technology and Communications	Grantmakers Nonprofit Summit
5	6	7	8	9
		Advanced Quickbooks		
12	13	14	15	16
		Executive Transitions Series	Technology and Communications	
19	20	21	22	23
		Finance as a Second Language	Technology and Communications	
26	27	28	29	30
			Demystifying Marketing for Nonprofits	

JUNE

		Finance as a Second Language		
2	3	4	5	6

COLLABORATION

Collaboration Series: Shared Resources, Shared Risks, Shared Rewards

Four Wednesdays, February - April, 8:30 a.m. - noon

Collaboration is not just a fad but the key to long-term change for our communities. It can create power and energy to change systems, lives and organizations. In this series, you will learn how to collaborate more effectively and efficiently with your present and future partners.

Collaboration: One Plus One = More Than Two

Wednesday, February 19

Collaboration between organizations can achieve better results. But it's not easy. This session will:

- Discuss the four rules for success
- Give examples of collaboration results that no organization could have achieved alone
- Define a range of relationships between organizations
- Identify the four stages of collaboration development

Instructor: Mary Ohmer, Research Fellow, Ph.D. Program, School of Social Work, Office of Child Development, University of Pittsburgh

Multi-Sector Partnerships: Harnessing the Power of Businesses and Government Toward a Common Vision

Wednesday, March 12

In this session, you'll learn how to:

- Partner with a private corporation
- Develop an appeal
- Assess which businesses to approach
- Make a public-private sector partnership work
- Develop common goals, common language and a structure to make it work

Instructors: Dave Droppa, Assistant Professor, Seton Hill University, and Dave Coplan, Director, Mon Valley Providers Council

Evaluation of Results: What is the Return on Investment?

Wednesday, April 2

This session will give examples and tools for:

- Knowing the impact your collaborative has on your customers
- Designing clearly defined and measurable outcomes
- Designing a system to capture and communicate successes

Instructors: Mary Beth Rauktis, Director of Evaluation and Research, Pressley Ridge Schools Inc.; Anne Farber, Director of Planning and

Evaluation Project, Office of Child Development, University of Pittsburgh

Managing the "Portfolio of Organizations": Troubleshooting and Staying on Track

Wednesday, April 30

In this session, you'll learn:

- How to diagnose and correct problems before they derail your progress, including conflict resolution, role clarification and dealing with difficult members
- How to assess your own skills for collaboration and identify areas for growth
- How the leadership of the collaborative can ensure healthy decision-making
- How to fund your collaborative

Instructor: Terri Baltimore, Program Director, Hill District Community Collaborative

Location: Robert Morris University's Pittsburgh Center, Room 308, 600 Fifth Ave., downtown Pittsburgh

Fee: \$50 for each session or \$150 for all four sessions

EXECUTIVE TRANSITIONS

Executive Transitions Series - NEW!

Four Sessions, January - May

The right leadership at the top is one of the keys to success for nonprofits. Nonprofits can take advantage of an executive transition by engaging a thoughtful process to find the right person to lead the organization into the future. This series will help you learn the steps to ensure that your organization thrives through management transitions. Topics include:

- The pros and cons of using an interim director
- Planning now for an eventual transition
- Determining your needs for the next executive
- A good job description and salary package
- The recruiting and interviewing process
- Ensuring the new director's success

Executive Transitions: Taking Advantage of Change

Wednesday, January 8, 1 - 5 p.m.

We'll share some of the best practices across the country for healthy transitions, as well as national research and resources in the field. Topics include:

- The pros and cons of using a search firm
- The search committee's role
- Pitfalls to avoid during a search
- The effect on organizational culture and reputation

Instructor: Susan Egmont, Principal, Egmont Associates, Boston, Mass.

Managing the Transition: Nuts and Bolts

Wednesday, February 12, 8:30 a.m. - noon

You're not only looking to replace the former director, but also to hire the right person for the future. Regardless of the circumstances under which your director departs, a healthy transition includes the following:

- A proper send-off and consistent public relations
- A brief organizational overview of what key challenges lie ahead and what changes need to occur in structure or strategy
- The role of other leaders in your organization during a transition
- Ensuring the success of your new executive

Instructors: Peggy Morrison Outon, Executive Director, Bayer Center for Nonprofit Management, with a panel representing different perspectives in an executive transition (TBA)

Succession Planning: Planning AHEAD for Transition of Key Positions in Your Organization

Thursday, April 10, 8:30 a.m. - noon

Succession planning asks the following questions:

- What are the key positions in the organization?
- What is the succession plan for key positions?
- What plans do you have to develop employees to meet future needs?
- What are your outside hiring needs for key talent?
- What resources do you need from others to achieve staffing, development and retention goals?

Instructor: Barbara Stelluto, M.S. in Human Resources Management

Promises and Pitfalls of Using Interim Directors

Wednesday, May 14, 8:30 a.m. - noon

Many nonprofits have used interim directors to ensure a smooth transition to a new leader. We'll address key issues about interim directors, such as:

- Evaluating whether or not you should hire an interim director
- Under what circumstances interim directors are especially helpful
- Skills they should possess and tasks that should be given to them
- Dangers you should be aware of while using interims

Instructor: TBA

Location: Robert Morris University's Pittsburgh Center, Room 308, 600 Fifth Ave., downtown Pittsburgh

Fee: \$50 for each session or \$150 for all four sessions

If you want to ensure your new executive director's success, don't miss **Thriving as an Executive Director, the March 11 workshop with Barbara Miller of the Support Center for Nonprofit Management in New York. See page 8 for details.*

FINANCE

Finance as a Second Language

Every Other Wednesday, April 23 - June 4, 8:30 a.m. - noon

Speak more fluent nonprofit finance and walk away with a customized finance tool after just four sessions!

This course is designed for anyone interested in understanding nonprofit financials more completely. We'll help you identify the drivers of financial viability in your organization, build a custom model for tracking performance, communicate financial results to your stakeholders, proactively address risks and take action.

Revenue: The Fuel that Drives Your Organization

Wednesday, April 23

Learning goals:

- Understand how to model your organization's trends
- Evaluate your revenue streams

Tool-building goals:

- Introduction to the financial tool
- Writing a revenue strategy

Outside expertise will include a foundation officer and for-profit "partners"

Expense: The Costs Associated with Running Your Nonprofit

Wednesday, May 7

Learning goals:

- Matching expenses to goals
- Using management letters to inform organizational decisions
- Mastering the art of allocation

Tool-building goals:

- Introduction to modeling financial trends

Outside expertise will include area accountants

Working Capital: The Primary Way to Fund Operations

Wednesday, May 21

Learning goals:

- Lines of credit, cash management and investment strategies
- Where to get good advice on all of the above

Tool-building goals:

- Individualizing the financial tool

Outside expertise will include bankers and investment experts

Cash Flow: The Key to Sustainability

Wednesday, June 4

Learning goals:

- Long-term financial strategies that work.

Tool-building goals:

- Completion of the financial tool

Optional Individual Session

An additional session may be scheduled for class members who would like specific financial questions answered or additional features installed in the financial tool.

workshop covers all aspects of researching grants, writing grant proposals and negotiating with funding sources. It is designed for both novice and advanced grant-seekers.

During the workshop, you will learn the most widely used proposal writing format in the world. Using a wealth of on-site materials, you will investigate funding sources for your organization. There is also a strong emphasis on team-building; participants will work in groups to prepare and write an actual proposal.

Upon completion of the workshop, graduates will receive a one-year membership to The Grantsmanship Center (TGCI), which includes proposal review and an array of benefits and services. You will also be enrolled in the Alumni Forum, an online discussion group for the exclusive use of TGCI alumni, trainers and staff.

Classes fill quickly. Register early by calling TGCI at 800-421-9512 or visiting their website at www.tgci.com.

Location: Robert Morris University's Pittsburgh Center, Room 608, 600 Fifth Ave., downtown Pittsburgh

Fee: \$775

Innovative Financing 101

Eight Tuesdays, February - April, 5-8 p.m.

This certificate program is designed to help you learn innovative and creative techniques to secure additional resources for your nonprofit organization. You'll reflect and learn from other talented fundraising professionals how to:

- Create a comprehensive development plan for your organization
- Increase earned revenue
- Use new tools, techniques and research to diversify your funding base
- Engage your board in proactive fundraising
- Make good technology acquisition choices
- Clarify your organization's development goals
- Utilize new presentation techniques
- Hold candid conversations with funders about building successful partnerships

Upon successful completion of the eight-week course, participants will receive a certificate in fund development.

Towards a Diversified Funding Base: Using a Development Audit

Tuesday, February 25

Peggy Morrison Outon, Executive Director, Bayer Center for Nonprofit Management

Analysis of Opportunity/The Various Faces of Philanthropy: Building a Comprehensive Development Plan

Tuesday, March 4

Peggy Morrison Outon

Technology for Increased Donations

Tuesday, March 11

Duff Batchelder, Principal Consultant, Management Solutions for Nonprofit Organizations, LLC, New York, and Jeff Forster, Director of Technology Services, Bayer Center for Nonprofit Management

A Board that Loves to Fundraise: Using Your Plan to Create Constructive Partnerships

Tuesday, March 18

Peggy Morrison Outon

Funder Panel

Tuesday, March 25

Panel of local funders

The Art of Storytelling: Developing Your Case

Tuesday, April 1

Peggy Morrison Outon

Strategies for Building the Individual Donor Base/Presenting Your Plan

Tuesday, April 8

Peggy Morrison Outon and class participants

(No class on Tuesday, April 15)

Completing the Plan: Continued Plan Presentations

Tuesday, April 22

Peggy Morrison Outon and class participants

Location: Robert Morris University's Pittsburgh Center, Room 302, 600 Fifth Ave., downtown Pittsburgh.

Fee: \$500, which includes all materials and a light dinner at each session

Innovative Financing 201: An Executive Leadership Forum – NEW!

Every Other Thursday,
February 13 - March 27, 5-8 p.m.

Are you charged with securing your organization's financial stability? Has this been a long-term assignment? Are you growing weary of the repeated challenges of donor relationships? Are you squeezed by the demands of board members, seeking to refresh and renew your thinking about development strategies and hungry for the latest techniques of financial analysis – yet bored at the prospect of another traditional development training session?

Join us for a sustained conversation about the pleasures and challenges of leaders who must continually address the financial needs of their organizations while never losing sight of the mission and the people they serve. This funder-practitioner perspective is intended to elicit deeper insights for all who engage in the class dialogue. This is a peer learning

opportunity intended to mine the wisdom of the group as we reflect on our collective experience and the current situation for nonprofit leaders. The class will include:

- Case studies on ethics, board relations and understanding markets
- The latest research on nonprofit financial strategies
- An opportunity to be videotaped in the development encounter and receive feedback
- Guest experts

Participants must have a minimum of five years' experience as a senior manager in a nonprofit organization. Class size will be limited to 15 participants, who will be admitted by application only. Please call Jon Paslov at 412-227-6862 for an application or log on to www.bmu.edu/bcnm. Participants will be notified of acceptance by February 1.

Instructors: Scott Izzo, Associate Director, Richard King Mellon Foundation, and Peggy Morrison Outon, Executive Director, Bayer Center for Nonprofit Management

Location: Cool dining establishment TBA

Fee: \$500, which includes dinner and provocative conversation

FUND DEVELOPMENT

Creating Effective Proposals with Microsoft Word – NEW!

Every Wednesday, February 5-26,
1 - 4:30 p.m.

Wish there was an easier way to make those grant proposals and reports shine? Tired of spending hours making a document look perfect, only to hear someone else's printer made a mess of it? Requesting and reporting funding is crucial to your organization, but sometimes reformatting and revising your documents leaves you little time to focus on what you're actually trying to say. We'll show you how to use styles and other formatting and editing tools to polish your documents and still leave you time to read that proposal once more.

Instructor: Lynn Keegan

Location: The Bayer Center for Nonprofit Management at Robert Morris University, 718 Fifth Ave., downtown Pittsburgh

Fee: \$200

Grantsmanship Center Training – NEW!

Monday - Friday, January 13-17,
8 a.m. - 5 p.m.

The Bayer Center for Nonprofit Management and the Community Technical Assistance Center (CTAC) are pleased to welcome the Grantsmanship Center Training Program to Pittsburgh. This five-day, intensive, hands-on

LEADERSHIP SKILLS

Choosing the Right Consultant – NEW!

Friday, February 28, 8:30 a.m. - noon

What causes a disappointed client? What are the sources of frustration for nonprofit consultants? What makes a successful consulting partnership? This workshop will be a dialogue between organizations and consultants on how to make the right match. It is designed for nonprofits using or contemplating the use of consultants, as well as for current and future nonprofit consultants. The workshop focuses on building a strong relationship based on client need, consultant expertise and mutual trust. The contracting phase is explored so that both parties enter the relationship with clear expectations and a well-defined road map.

The workshop also includes:

- A discussion of research on productive relationships between clients and consultants, conducted for the Alliance for Nonprofit Management and the United Way of New York
- An interactive tool underdevelopment by PACE, the Bayer Center and the Master Consultants Series to evaluate the effectiveness of nonprofit consulting relationships
- A panel of Master Consultants that will reflect on consulting experiences that illustrate best and worst practices

Instructors: David S. Birdsell, Professor and Executive Director of Academic Programs, School of Public Affairs, Baruch College; Barbara Bazron, Ph.D., Executive Director, PACE; a panel of Master Consultants
Location: Robert Morris University's Pittsburgh Center, 600 Fifth Ave., downtown Pittsburgh
Fee: \$50

Skills for Today's Leaders: Ethical Fitness and the Science and Art of Negotiation – NEW!

Every Friday, January 31 - February 21, 8:30 a.m. - noon

This four-part series looks at ethical decision-making and negotiation strategies for today's nonprofit leaders. Sessions 1 and 2 should be taken together, as should Sessions 3 and 4.

Sessions 1 & 2: Leading with Values: Ethical Fitness for Nonprofits

Friday, January 31 and February 7

SESSION 1: Achieving "ethical fitness" means having the tools and the confidence to handle tough ethical dilemmas. Using techniques from the Institute for Global Ethics, you will learn values-based ethical decision-making to promote trust, cooperation and efficiency within your organization.
SESSION 2: Dilemmas give no warning and no time to ponder – you've got to make that tough decision right now! This workshop will delve deeper into the Leading with Values paradigm to outline a simple, orderly process for dealing with tough decisions and to help prevent decisions that can expose organizations to legal, financial and public relations problems.

Instructor: Peggy Morrison Outon, Executive Director, Bayer Center for Nonprofit Management and Certified Trainer, Institute for Global Ethics

Sessions 3 & 4: The Science and Art of Negotiation

Friday, February 14 and 21

Professional success requires agreement and collaboration. These sessions will introduce you to the science and art of negotiation, which is critical to successful bargaining. You will learn negotiation tools, strategies and tactics, and participate in two negotiation simulations. See why different negotiators reach different settlements when given the same initial instructions, and why some reach agreement while others do not. Comparing your results with the workshop's collective experience will demonstrate the economic, psychological and social dynamics of the negotiation process.

Instructor: Linda Moya, B.S. and M.S. in Industrial Management, Ph.D. Candidate at the School of

Public Policy and Management at Carnegie Mellon University

Location: Robert Morris University's Pittsburgh Center, 600 Fifth Ave., downtown Pittsburgh
Fee: \$100 per session set (sessions 1 & 2 must be taken together and sessions 3 & 4 must be taken together) or \$150 for the whole series, which includes the cost of materials and a light breakfast.

Thriving as an Executive Director – NEW!

Tuesday, March 11, 8:30 a.m. - 4 p.m.

Increasingly, executive directors confront problems with infrastructure and relationships as they attempt to guide organizations that are financially vulnerable and have informal support systems. The new ED must make a place for him/herself with very little orientation. This workshop offers new or experienced executive directors the opportunity to make connections with other EDs, work together on common issues and define their leadership roles. This workshop will:

- Provide an overview of the many balls an ED is expected to juggle
- Help you understand different leadership styles and alternative approaches to being an ED in response to your unique circumstances
- Identify and address common areas of concern, such as board and staff relations

Instructor: Barbara Miller, Senior Staff Consultant, Support Center for Nonprofit Management, New York

Location: Robert Morris University's Pittsburgh Center, 600 Fifth Ave., downtown Pittsburgh
Fee: \$100, which includes light breakfast, lunch and course materials

MARKETING AND COMMUNICATIONS

Marketing in the Digital Age – NEW!

Every Other Friday, February 21 – April 4, 8:30 a.m. - noon

The Fundamentals of Marketing and Research

Friday, February 21

The backbone of an effective marketing campaign is knowledge. Research can help you identify your target audience and the best way to present your program meaningfully. Using traditional and high-tech methods, you'll learn practical strategies for research, the four basic elements of marketing and the distinction between social and traditional marketing.

Instructor: Jill Maher, Ph.D. Assistant Professor of Management and Marketing, Robert Morris University

Building Value: Marketing Leverage for Social Capital

Friday, March 7

Creating and demonstrating value is one of the most critical challenges facing nonprofit organizations. This session will provide strategies for deploying research findings in a way that helps build intrinsic value for the organization to attract donors, volunteers and clients.

Instructor: Jeff Krakoff, President, Krakoff Communications Inc.

Branding and Imaging: Creating an Identity in the Social Sector

Friday, March 21

Every commercial organization, from McDonald's to the blood bank around the corner, has a brand. However, nonprofit organizations are uniquely challenged to present an image that demonstrates value and builds support. This session will present options for strategically branding your organization.
Instructors: Matthew Holland, Creative Director, and George W. Potts, Business Development Manager, Little Tornadoes

Promoting Your Organization with Technology

Friday, April 4

"If we build it, they will come." Unfortunately, it's not that simple. Learn practical and effective means to promote your organization.

Instructors: Fran Davis, Director of Interactive Design, and Dan Foley, Director of Information Technology, MicaMedia Inc.

Location: Robert Morris University's Pittsburgh Center, 600 Fifth Ave., downtown Pittsburgh
Fee: \$50 per session or \$150 for all four sessions

Technology and Communications – NEW!

Every Thursday, May 1- 22, 1-4:30 p.m.

Remember, it's not just what you say, but how you say it. Learn to maximize Microsoft Office to communicate effectively with your board, volunteers and clients in this four-part, hands-on learning lab. Take all four sessions or just take the ones you need:

Creating Effective Presentations with PowerPoint

Thursday, May 1

Reaching the Right Audience with Outlook

Thursday, May 8

Developing Brochures on a Budget with Publisher

Thursday, May 15

The Magic of Mail Merge with Word, Excel and Access

Thursday, May 22

Instructors: Sallie Wormer, Jeff Forster, TBD
Location: The Bayer Center for Nonprofit Management at Robert Morris University, 718 Fifth Ave., downtown Pittsburgh
Fee: \$50 per session or \$150 for all four sessions

TECHNOLOGY

a la Carte Series

Technology 101

Every Other Wednesday, January 29 - March 12, 8:30 a.m. - noon

Many nonprofit organizations, especially small ones, do not have a full-time technology manager. Rather, an individual or small group with technology savvy is depended upon to handle computer issues – from networking to printing to databases to hardware – and must fit these tasks in around a "real job." If this sounds like you, these quick and dirty training sessions will help you survive and thrive in this role, whether you've chosen it or it's been thrust upon you.

Front-Line Survival Skills

Wednesday, Jan. 29

If you're an accidental or reluctant techie, we'll help you survive life on the front line by enhancing your troubleshooting skills, teaching you how to talk to IT vendors and identifying ways to make your job manageable (and your users' lives easier).

Network Basics

Wednesday, Feb. 12

If you're not really sure what you have and why you have it, we'll demystify networks for you and show you what your options are, what the real benefits (and costs) are, what all that hardware stuff means and what you really need to know.

Information Management

Wednesday, Feb. 26

You need to analyze data and report with dependable numbers. Day-to-day operation depends on your constituent information and interaction. The key is an information management strategy and database. We'll define a database, what it can and can't do and help you decide whether to buy an existing solution or build a custom application.

Security Essentials

Wednesday, March 12

Viruses. Hackers. Denial-of-service attacks. Data theft. We'll tell you what the real risks are and how you can protect your organization from them while minimizing their potential effects.

Instructors: Sallie Wormer, Technology Services Analyst, and Jeff Forster, Director of Technology Services, Bayer Center for Nonprofit Management

Location: The Bayer Center for Nonprofit Management at Robert Morris University, 718 Fifth Ave., downtown Pittsburgh

Fee: \$50 per session or \$150 for all four sessions

Technology 201

Every Other Thursday,
March 13 - April 24, 1-4:30 p.m.

More advanced topics from our popular Technology 101 series. Basic troubleshooting and advanced Windows skills are a prerequisite.

Windows Troubleshooting

Thursday, March 13

The blue screen of death. Illegal page faults. What does it all mean? Dive into the Control Panel, the Registry and other critical areas without making mistakes.

Demystifying Hardware

Thursday, March 27

Ever wonder what that funny-looking stuff inside your computer did? Thought that adding more memory couldn't be too difficult but were afraid to try? We'll take off the 'emperor's clothes' and show you the inner secrets of a PC.

Advanced Information Management

Thursday, April 10

Do your end-of-year reports take all year to produce? An in-depth look at how day-to-day operational information can be converted into useful analytical data for reporting and decision-making.

Building a Windows Peer-to-Peer Network

Thursday, April 24

You've got less than 10 people in your office and are still sharing files with floppy disks, or worse, paper! We'll show you the basics of setting up a simple network to share files and printers and give you tips on troubleshooting.

Instructors: Sallie Wormer, Technology Services Analyst, and Jeff Forster, Director of Technology Services, Bayer Center for Nonprofit Management

Location: The Bayer Center for Nonprofit Management at Robert Morris University, 718 Fifth Ave., downtown Pittsburgh

Fee: \$50 per session or \$150 for all four sessions

Hands-On Training

Early enrollment is encouraged due to limited space in these hands-on training sessions. All courses are offered on laptops with Windows 2000 and Office 2000.

Access Queries A to Z – NEW!

Every Thursday,
February 27 - March 13, 9 a.m. - noon

Information in a database is only as valuable as your ability to retrieve it in a useful way. This series will explain how to retrieve and manipulate information, from single record retrieval to aggregating data in multiple tables for complex analysis. The sessions will cover: querying in the form; the query grid; one-table queries; selecting fields; ordering records; entering and bundling parameters; multi-table queries; table relationships; finding and managing duplicates; queries based on queries; crosstabs; calculations; expressions; and manipulation queries.

Instructors: Nancy Marshall, Volunteer Management Consultant, Executive Service Corps of Western Pennsylvania; Jeff Forster, Director of Technology Services, Bayer Center for Nonprofit Management

Location: The Bayer Center for Nonprofit Management at Robert Morris University, 718 Fifth Ave., downtown Pittsburgh

Fee: \$150

Advanced QuickBooks – NEW!

Every Wednesday,
April 23 - May 7, 9 - 4 p.m.

This course details how to use QuickBooks accounting software through the complete accounting cycle. We'll go beyond setting up a QuickBooks company and basic transactions to inventory and payroll functions. You'll learn how to create reports and graphs, memorize transactions and customize forms. Advanced functions like inventory, time tracking and estimating also will be covered. This class is designed for intermediate users of QuickBooks.

Instructors: Brian Beerman, Connie Choncek and Marian Linton, Beerman, Piper & Associates

Location: The Bayer Center for Nonprofit Management at Robert Morris University, 718 Fifth Ave., downtown Pittsburgh

Fee: \$150

How to Manage Your Client Information Using Microsoft Access

Every Wednesday, March 19 - April 9,
9 a.m. - 12:30 p.m.

In the nonprofit sector, information is a vital currency. The right tool to track who you serve, how you assist them and your impact is essential. This course is aimed at those who maintain client records. We will explain what a database can do and give you a client management database template. You will learn how to arrange client records in household groups, store outcome measurements, record services delivered and create mail merges, rosters, discharge lists and analytical reports. This course covers general database theory and Microsoft Access, assuming no prior database knowledge.

Instructor: Jeff Forster, Director of Technology Services, Bayer Center for Nonprofit Management

Location: The Bayer Center for Nonprofit Management at Robert Morris University, 718 Fifth Ave., downtown Pittsburgh

Fee: \$200

How to Manage Your Mailing List Using Microsoft Access

Every Thursday, January 30 - February 20,
9 a.m. - 12:30 p.m.

Your mailing list is key to organizational survival. This course is aimed at anyone who is frustrated by their nonprofit's method for maintaining and using constituent contact information. This course covers general database theory and Microsoft Access, assuming no prior database knowledge. You'll learn to design a database that fits your organization's needs; create tables and forms; query for individuals and groups; create mail merges, mailing labels and nametags; and generate reports and queries for easy, dynamic analysis.

Instructor: Jeff Forster, Director of Technology Services, Bayer Center for Nonprofit Management

Location: The Bayer Center for Nonprofit Management at Robert Morris University, 718 Fifth Ave., downtown Pittsburgh

Fee: \$200

HIPAA Learning Opportunities

The Health Insurance Portability and Accountability Act (HIPAA) of 1996 is now the law. It has been described as pervasive, and experts say it will turn the health and human services industry on its collective ear. Due to its scope, the U.S. Department of Health and Human Services has instructed agencies to begin compliance efforts now. Regulations have been finalized or are in the

process of being finalized that require compliance in four key areas: transaction codes, privacy, security and unique identifiers.

If you access, store or transmit information that links an individual with a physical or mental health condition, you'll need to comply with 71 new security regulations by February 2005. These requirements include:

- User authentication
- Internal access control to software and hardware
- External access control to the network
- Audit trails
- Tested and implemented disaster and recovery plans
- Risk and vulnerability analyses
- Documented security policies and procedures
- User education

Complying with HIPAA Security Regulations

Tuesday, January 21, 8:30 a.m. - noon

If your organization is subject to HIPAA security regulations and you don't know where to start, this half-day seminar is for you. We'll help you determine the need to develop a security work plan, assess your infrastructure for potential security vulnerabilities, implement safeguards to protect confidential patient information and minimize the risk of costly federal fines and liability exposure from non-compliance.

Instructor: Jim Mountain, Vice President, Carter-Mountain Affiliates Inc.

Location: Robert Morris University's Pittsburgh Center, 600 Fifth Ave., downtown Pittsburgh

Fee: \$50

HIPAA Security Regulations Study Group – NEW!

Every Other Tuesday,
February 25 - May 6, 8:30 a.m. - noon

This six-session study group provides hands-on coaching and assignments to get you well on your way to HIPAA security regulation compliance. Over a 12-week period, you will: work your way through a complete security assessment; develop a gap analysis and compliance plan for your organization; revise or write the 23 required security policies; and learn about best technology practices that address specific security issues. Due to the amount of work required to become HIPAA compliant, organizations are encouraged to send more than one person.

Instructor: Jim Mountain, Vice President, Carter-Mountain Affiliates Inc.

Location: Robert Morris University's Pittsburgh Center, 600 Fifth Ave., downtown Pittsburgh

Fee: \$425 for the first person, \$300 for each additional representative

UPCOMING EVENTS

Grantmakers Nonprofit Summit

Friday, May 9, 8 a.m. - 5 p.m.

This annual nonprofit conference is co-sponsored by Grantmakers of Western Pennsylvania, The Nonprofit Leadership Institute at Duquesne University and the Bayer Center for Nonprofit Management at Robert Morris University. Location and fee TBA.

Demystifying Marketing for Nonprofits

Thursday, May 29, 8:30 a.m. - 4 p.m.

Gary J. Stern returns to Pittsburgh with this powerful and positive one-day workshop. "The BEST has gotten BETTER," captures reviewers' responses to the 2001 revised edition of Stern's *Marketing Workbook for Nonprofit Organizations. Volume I: Develop the Plan* is now accompanied by *Volume II: Mobilize People for Marketing Success*. Stern has also edited the revised edition of the Drucker Foundation Self-Assessment Tool and led the Drucker Foundation Training Team. This is sure to be an enjoyable day on an essential topic for these challenging times. Location and fee TBA.

Master Consultants Showcase

Date TBA

Over the last three years, the Master Consultants have all had a wonderful opportunity to become a learning community, studying promising practices that build strong nonprofit solutions in order to be better consultants to regional nonprofits. We invite to join us in celebrating their success and witnessing their skills and talents. Perhaps you'll find your organization's next consultant! Location and fee TBA.

Tech for Execs

Sessions and Dates TBA

If you have a sneaking suspicion that the words "technology" and "nonprofit" are not mutually exclusive, come join other like-minded leaders to informally explore the benefits of mission-driven solutions. This ongoing series for nonprofit decision makers showcases best-practices technology and provides opportunities for non-technical peer learning and support. Location and fee TBA.

United Way Managing for Excellence Initiative

Ongoing

This joint initiative by the United Way of Allegheny County and the Bayer Center for Nonprofit Management includes an organizational assessment and self-assessment as defined by Drucker methods. Once an organization completes this process, there is an opportunity to compete for management excellence grants. To learn more, contact Marcia Clark at the Bayer Center at 412-227-6874.

United Way Drucker Training for Community Leaders

Friday-Saturday, May 30-31, 8:30 a.m.- 4 p.m.

INSTRUCTORS

Terri L. Baltimore is program director for the Hill District Community Collaborative, which coordinates services for women in recovery and their families. Baltimore is responsible for creating programming for participant families, developing additional partnerships and collaboration. She has worked as a community organizer since 1983, including work at the Pittsburgh Neighborhood Alliance/ Neighborhood Safety Program, Mon Valley Initiative and the Community Housing Resource Board (now know as the Fair Housing Partnership).

Clark H. ("Duff") Batchelder Jr. is principal consultant of Management Solutions for Nonprofit Organizations, LLC, in New York. The firm focuses on providing nonprofit organizations with consulting and technical assistance in fundraising, marketing and communications. Batchelder's background includes over 25 years in the nonprofit sector, including work as a school teacher and administrator, theatre company manager, associate director of a drop-out prevention program and consultant with a fundraising and management consulting firm.

Barbara J. Bazron, Ph.D. is executive director of the Program to Aid Citizens' Enterprise (PACE), a grant-making organization that provides support to agencies in Pittsburgh and Allegheny County that serve disadvantaged communities. PACE provides technical assistance through the Community Based Asset Development (CBAD) program and offers academic tutoring, counseling and cultural enrichment to middle and high school students through the PACE Opportunity Program (POP) and Setting the PACE. Bazron's background includes extensive work in public policy issues related to substance abuse; training and facilitating professional meetings and conferences; addressing health care, education and cultural competence issues; providing technical assistance to community and state organizations with policies and programs in these areas; and strategic planning.

Brian Beerman is a certified public accountant and partner with Beerman, Piper and Associates. He has over 17 years of public accounting experience, including 16 with Ernst & Young. He provides audit and consulting services to clients in many industries, including the nonprofit sector. Beerman has significant experience in developing and conducting training seminars on nonprofit accounting and business issues.

David S. Birdsell is professor and executive director of academic programs for the School of Public Affairs at Baruch College. His work centers on the nexus of communication, media and information technology in politics, government and nonprofit administration. He studies public access to information technology and advises the New York Public Library, the Congressional Management Foundation and other organizations on communication and technology programming. Birdsell has worked with the Alliance for Nonprofit Management and the United Way of New York City to better understand organizations' professional development needs and uses of consultants in the nonprofit community. He received B.A. and M.A. degrees from the University of Virginia and a Ph.D. in public communication from the University of Maryland.

Connie Choncek is an associate with Beerman, Piper & Associates and has over 12 years of accounting experience, including extensive work with QuickBooks. She has provided various industries, including nonprofit organizations, with QuickBooks services such as the processing of financial data, preparing and presenting financial statements and budgets, and reporting to outside grant agencies.

Dave Coplan is associate director of The Human Services Center and director of the Mon Valley Providers Council. He has worked for the United Way and the United Jewish Federation and performed consulting for UPMC Braddock, Auberle, UPMC McKeesport and others. Coplan is president of the Regional Business Alliance Foundation's board and serves on the board of the Pantry Network of Eastern Suburbs and the Three Rivers Workforce Investment Board. He has taught courses on nonprofit management at the University of Pittsburgh.

Fran Davis is partner and director of multimedia design at Mica Media Inc. She is responsible for the final look and feel of all of Mica Media's output as well as for the firm's reputation for producing professional and modern websites. Her close attention to detail and simple designs make her websites exceptional. Davis has been in the field of graphic design for eight years. She has a master's degree in multimedia design from Duquesne University.

David C. Droppa, Ph.D. is a faculty member in the social work program at Seton Hill University in Greensburg, Pa., and previously served as executive director of Three Rivers Youth. He has over 30 years of clinical, fundraising, administrative and academic experience, focusing primarily on services for youth and families. Droppa maintains a small family therapy practice and provides strategic consultation to private and public corporate clients in Western Pennsylvania.

Susan Egmont is principal of Egmont Associates in Boston, Mass., an executive search firm for organizations, corporations, foundations and academic centers with nonprofit interests. She has 25 years of experience in youth development, education, workforce development, healthcare, children's issues, the arts, and fighting hunger and poverty. Egmont's passion is excellence in nonprofit management. Her client work includes leadership transition planning, board and search committee development, recruiting and coaching.

Anne Farber, Ph.D. is director of the Planning and Evaluation Project at the Office of Child Development at the University of Pittsburgh. She has been a research associate with the project since 1993. Previously, she was executive director of the Louisiana State Planning Council on Developmental Disabilities. In addition to conducting program evaluations, Farber has extensive experience in providing technical assistance to community-based agencies and providing training in program evaluation to human services staff.

Dan Foley is partner and director of information technology at Mica Media Inc. A master of the art of website development, he has the magical ability to make a web site do anything the human mind can imagine. Foley feels that websites should be more than just something to look at - they also should function without long load time or flaws. He has been in the field of website development for 10 years and holds a bachelor's degree in computer science from the University of Pittsburgh.

Jeff Forster is director of technology services at the Bayer Center for Nonprofit Management at Robert Morris University. Forster has assisted a variety of nonprofit organizations in the Pittsburgh area, specializing in the use of databases for process improvement. Most recently, he served as policy analyst in the City of Pittsburgh's Planning Department. Forster holds a master's degree in public policy and management from Carnegie Mellon University, which he earned while working as an information management specialist for the university.

Matthew Holland is creative director and general manager for the Pittsburgh office of Little Tornadoes. He has developed front-end visual and information design solutions for complex back-end database systems. Holland was an assistant artist in the world-renowned Documenta IX exhibition in Kassel, Germany, and an art director for Tal Donovan in Lancaster, Pa., as well as for Lotas Minard Patton McIver Inc. and Grybauskas Beatrice, both in New York. Holland holds a bachelor of fine arts degree with a concentration in metal sculpture from Franklin & Marshall College and also studied advertising and graphic design at the School of Visual Arts in New York.

Scott Izzo serves the Richard King Mellon Foundation as associate director. He works with a broad array of nonprofit agencies in the human service, youth development and education fields, in addition to local and national organizations in the environmental arena. Izzo has served on the boards of several organizations, including Grantmakers of Western Pennsylvania, the Western Pennsylvania Conservancy, the Bayer Center for Nonprofit Management and the Student Conservation Association.

Lynn Keegan is an independent consultant with 25 years of experience in application development, training and software integration for Novell, IBM, Corel and Microsoft products. She has an extensive background in the technical and logistical aspects of document publication. Prior to her consulting work, Keegan was employed by Westinghouse Electric Corp. for 13 years and was instrumental in the development and implementation of one of the corporation's first word processing centers.

Lisa Kuzma, director of consulting at the Bayer Center for Nonprofit Management at Robert Morris University, has dedicated her 20-year career to financial management and organizational assessment. She has served small- and medium-sized businesses in the for-profit sector but has a passion for assisting nonprofit organizations, primarily in the areas of assessment and fiscal responsibility. She is the architect of several tools for nonprofit management. At the Bayer Center, Kuzma manages the overall consulting practice and, more importantly, works with clients to develop action-oriented business plans and the tools to execute those plans.

Spring 2003 Course Registration Form

Jeff Krakoff, is founder and president of Krakoff Communications Inc. (KCI). A seasoned public relations professional, his career spans 16 years in financial, business-to-business, consumer, trade association and nonprofit settings. KCI clients range from Fortune 500 companies such as Bayer, Heinz and Sherwin-Williams to small companies and nonprofit organizations. Krakoff has published dozens of articles on marketing communications and is an adjunct professor in journalism and mass communication at Point Park College. He is a member of the Public Relations Society of America (PRSA) and serves on the board of directors of the Pennsylvania Association of Nonprofit Organizations (PANO).

Marian Linton is a certified public accountant with Beerman, Piper & Associates and has over 17 years of diverse accounting experience. She has taught approximately 15 QuickBooks seminars in each of the past two years and provides controller services to clients using QuickBooks, including general ledger design and implementation and training of accounting personnel. She also has been responsible for generating and analyzing customized financial statements for management.

Kathy Mahoney has worked in public accounting with Arthur Andersen & Co. and has audit experience with nonprofits, financial institutions and manufacturing companies. She has used QuickBooks for various clients, including nonprofits, publishers, restaurants, service industries and a private school.

Jill Kurp Maher, Ph.D. is assistant professor of management and marketing in the School of Business at Robert Morris University. Prior to RMU, she taught at Saint Joseph's University in Philadelphia. Maher has presented research at several national marketing conferences and has published research in various advertising, marketing and consumer-related journals. Her research interests are in the area of child consumers, deviant consumer behaviors and nonprofit marketing and management. She is a member of several national marketing associations and a board member for Wagner Family Charities in Pittsburgh. She earned her doctorate in marketing from Kent State University.

Nancy Marshall is a volunteer management consultant with the Executive Service Corps of Western Pennsylvania. She has designed databases for a variety of nonprofit organizations in the region. Prior to her volunteer work, she was a database specialist with Westinghouse.

Barbara Miller is the senior staff consultant at the Support Center for Nonprofit Management in New York. She brings 15 years of experience to her client work, and she trains and consults across the country in the areas of strategic planning, financial management, board development and effective meetings. Miller has contributed to publications on financial management and strategic planning for nonprofit organizations. She holds an M.B.A. from UCLA.

Jim Mountain is vice president of Carter-Mountain Affiliates Inc. (CMA). He has a master's degree from the University of Pittsburgh and 16 years of experience as a Certified Network Engineer. Through his work, CMA has helped organizations in Western Pennsylvania become HIPAA-compliant by implementing improved security on Novell and Microsoft networks. These measures have included performing risk analyses and security audits as well as writing security policies.

Linda Moya is a Ph.D. candidate in negotiations at the School of Public Policy and Management at Carnegie Mellon University, where she conducts research in negotiations at the intersection of economics and psychology. Moya has 18 years of experience in the computer and telecommunications industries in various management positions, including labor relations. Previously, she was the center director for AT&T's business billing centers in Pittsburgh and Manassas, Va. Moya has conducted numerous seminars on various organizations and managerial subjects.

Mary Ohmer has over 15 years of experience working with community-based nonprofits, social service agencies, national nonprofits, chambers of commerce and government. She is in a Ph.D. program at the School of Social Work at the University of Pittsburgh, where she is working on a two-year interdisciplinary fellowship program in policy and evaluation at the Office of Child Development. Previously, she served as vice president for programs for the Consensus Organizing Institute (COI), a national nonprofit she helped to create.

Peggy Morrison Outon is the founding executive director of the Bayer Center for Nonprofit Management at Robert Morris University. She is also the founding director of the Centers for Effective Nonprofit Management in Austin, Texas, and New Orleans. Outon is the founding board chair of the Alliance for Nonprofit Management. A nationally noted consultant and trainer, Outon has worked with more than 450 nonprofit clients and raised more than \$22 million.

George Potts is a seasoned sales and marketing professional who serves as business development manager for Little Tornadoes' Pittsburgh office. Previously, Potts was vice president of sales and marketing for Eonnet Technologies. Additionally, he assisted the nation's largest technology trade association with the development of new sales processes and techniques for membership sales and also led a corporate sales team for CompUSA Inc. A Pi Sigma Alpha graduate of Duquesne University, he maintains an active role in politics while applying his skills and abilities to lead, persuade, promote and negotiate in the private sector.

Mary Beth Raultis, Ph.D. is director of evaluation and research for Pressley Ridge Schools Inc. Previously, she coordinated several research projects at the University of Pittsburgh Medical Center (UPMC), including a family study of depression and a study of family coping when a member has serious mental illness. She also has coordinated evaluations research for the Community Connections for Families project, UPMC and the Allegheny County Department of Human Services.

Barbara Stelluto is a certified human resources professional with a proven track record of creating and executing strategy to achieve business results through leadership development. Stelluto's specialty is competency-based systems. She has over 15 years of experience in organization and employee development, human resources and change leadership consulting.

Sallie Wormer is the technology services analyst at the Bayer Center for Nonprofit Management at Robert Morris University. Wormer has over 10 years of professional experience, the majority in planning and technology management in nonprofit organizations. Most recently, she served as network administrator for the United Jewish Federation of Greater Pittsburgh. She also has extensive teaching experience in academic and non-academic settings. Wormer holds a bachelor's degree in music with a minor in computer science from Allegheny College and pursued graduate studies at the University of Illinois.

Name _____

Organization _____

Address _____

City/State/Zip _____

Phone _____ Fax _____

E-mail _____

Collaboration

- Collaboration Series (\$50 per session or \$150 for all four sessions)
 - Collaboration
 - Multi-Sector Partnerships
 - Evaluation of Results
 - Managing the "Portfolio of Organizations"

Executive Transitions

- Executive Transitions Series (\$50 per session or \$150 for all four sessions)
 - Executive Transitions
 - Managing the Transition
 - Succession Planning
 - Promises and Pitfalls of Using Interim Directors

Finance

- Finance as a Second Language (\$245)

Fund Development

- Creating Effective Proposals with Microsoft Word (\$200)
- Innovative Financing 101 (\$500)
- Innovative Financing 201: An Executive Leadership Forum (\$500)

Note: To register for Grantsmanship Center Training, call TGCI at 800-421-9512 or log on to www.tgci.com.

Leadership Skills

- Choosing the Right Consultant (\$50)
- Skills for Today's Leaders (\$100 per session set or \$150 for all four sessions)
 - Sessions 1 & 2 – Leading with Values: Ethical Fitness for Nonprofits
 - Sessions 3 & 4 – The Science and Art of Negotiation
- Thriving as an Executive Director (\$100)

Marketing & Communications

- Marketing in the Digital Age (\$50 per session or \$150 for all four sessions)
 - Fundamentals of Marketing and Research
 - Building Value
 - Branding and Imaging
 - Promoting Your Organization with Technology

- Technology and Communications (\$50 per session or \$150 for all four sessions)
 - Creating Effective Presentations with PowerPoint
 - Reaching the Right Audience with Outlook
 - Developing Brochures on a Budget with Publisher
 - The Magic of Mail Merge with Word, Excel and Access

Technology

a la Carte Series

- Technology 101 (\$50 per session or \$150 for all four sessions)
 - Front-Line Survival Skills
 - Network Basics
 - Information Management
 - Security Essentials
- Technology 201 (\$50 per session or \$150 for all four sessions)
 - Windows Troubleshooting
 - Demystifying Hardware
 - Advanced Information Management
 - Building a Windows Peer-to-Peer Network

Hands-On Training

- Access Queries A to Z (\$200)
- Advanced QuickBooks (\$150)
- How to Manage Your Client Information Using Microsoft Access (\$200)
- How to Manage Your Mailing List Using Microsoft Access (\$200)

HIPAA Learning Opportunities

- Complying with HIPAA Security Regulations (\$50)
- HIPAA Security Regulations Study Group (\$425, \$300 for each additional organizational representative)

Payment Information

Amount Due \$ _____

- Check Enclosed (made payable to Robert Morris University/Bayer Center for Nonprofit Management)

Charge my: Visa MasterCard Discover

Account Number _____ Exp. Date _____

Account Name _____

Mail completed form with payment in full to:

Bayer Center for Nonprofit Management at Robert Morris University
718 Fifth Avenue, Pittsburgh, PA 15219-3099
Or fax with credit card information to 412-227-4097.

Registration confirmation and more information will sent via mail, fax or e-mail.

Registration Information

Registration deadline for all classes is two weeks before the course begins (or the first session of a series). Register early – space is limited. You may register for any of the courses by mailing or faxing the enclosed registration form, or by submitting the online general registration form at www.rmu.edu/bcnm. Payment in full by check or credit card must accompany registration. Registration confirmation and more information will be sent via mail, fax or e-mail.

Financial Aid

Financial aid of up to 50 percent of program costs is provided by the Alcoa Foundation and is available to a limited number of participants. For more information, see the scholarship form at www.rmu.edu/bcnm or contact Jon Paslov at 412-227-6862 or the Copeland Fund at the Pittsburgh Foundation.

Cancellation Policy

Cancellations received no later than one week before a session begins will receive a full refund minus a \$25 administrative fee. No refunds can be made for cancellations received less than one week before a session begins.

Questions?

For questions regarding Spring 2003 courses at the Bayer Center, please call 412-227-6814 or e-mail bcnm@rmu.edu.

