



# Urban Connection

Celebrating 40 years of helping you help others

## Finance Center Opens in April

After more than three years of intensive planning, the Finance Center of the Nonprofit Center of Milwaukee is open for business.

The Finance Center mission is to promote excellence in financial management throughout the four-county nonprofit sector that we serve, offering a comprehensive mix of training, consulting, and contracted services.

### Center offers concrete solutions to real challenges in nonprofit financial management

The Finance Center was created to meet real needs. Our research surveys revealed a demand for more resources to support the financial tasks required of nonprofits. For example, it was sobering to discover that in one survey more than half of the respondents indicated that they had not received financial training specific to nonprofit needs – indeed, a significant number had received no financial training at all.

Just as nonprofit staff and board members feel the need for help with financial matters, the organizations that fund the work of nonprofits also recognize the need for more robust financial services than currently exist. Funders and individual donors know that the accountability and sustainability they demand require on-going training for many nonprofit staff and boards.

The Finance Center will help nonprofits address these critical challenges.

### Three main ways the Finance Center can help

Finance Center services will be offered at competitive rates, with substantial discounts for Nonprofit Center of Milwaukee members. Here's a look at the main services available:

**Financial Management Training.** Building on the Nonprofit Center's decades-long commitment to training, the Finance Center will provide nonprofit staff and volunteers with training in bookkeeping, budgeting, grants management, regulatory reporting, the audit process, and financial planning.

**Financial Consulting.** Any organization benefits from a fresh set of eyes, and the Finance Center can provide just that through its comprehensive financial analysis and assessment services. Organizations will learn what's working, what's not, and how to fill the gaps. Complementing such assessment is more specific financial problem-

solving and help with the creation and implementation of business plans.

**Contracted Financial Services.** Many nonprofits may find it advantageous to outsource specific accounting functions. The Finance Center will offer full-service bookkeeping and accounting services, grant-related accounting and reporting services, budget preparation, and assistance in preparing the annual Form 990.

In addition to these three areas, the Finance Center will sponsor periodic financial roundtables for accounting staff, financial decision-makers, and board treasurers and finance committees. Finally, the Finance Center will

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save the date

#### April 18

Inspire by Example Luncheon  
11:30 a.m. – 1:00 p.m., Italian Community Center

#### May 5, 2007

Join Hands Day  
9:00 a.m. – Noon  
Milwaukee County Park in Brown Deer

#### June 27, 2006

The Accountability Imperative: Next Steps  
“Accountable Governance: Strengthening Nonprofit Boards”  
Jan Masaoka, former Executive Director of CompassPoint  
Nonprofit Services  
8:30 a.m. – 3:00 p.m.

#### October 3, 2007

“The Accountability Imperative: Next Steps  
Accountable Finance: Ensuring Integrity”  
Dottie Johnson, CPA, Lumity, a merger of Nonprofit Finance  
Center and IT Resource Center  
8:30 a.m. – Noon

#### November 3, 2007

Make A Difference Day  
8:00 a.m. – 1:00 p.m.  
Location: TBA

#### December 6, 2007

14th Annual “Spirit of the Nonprofit Sector: A Holiday  
Celebration of Diversity”  
5:30 p.m. – 8:30 p.m., Italian Community Center

## The Research Edge

Looking for a new place to find funders that are interested in your field? Check affinity groups.

They're the hottest trend in funder networking. Grantmakers get together to discuss issues, share news and tout achievements of successful grantees. Best of all: their membership lists contain prospects you'll want to pursue. Here's a sample of leading groups:



- **Grantmakers for Children, Youth & Families** [www.gcyf.org](http://www.gcyf.org): Promotes awareness and strengthens resources to improve life for families.
- **Environmental Grantmaker Association** [www.ega.org](http://www.ega.org): Convenes funders and posts news on conservation issues.
- **Grantmakers in Health** [www.gih.org](http://www.gih.org): Focuses on topics such as access, aging, public health, mental health, quality care and more.
- **Grassroots Grantmakers** [www.grassrootsgrantmakers.org](http://www.grassrootsgrantmakers.org): Engages people in community and neighborhood concerns.
- **Funders Network on Population, Reproductive Health & Rights** [www.fundersnet.org](http://www.fundersnet.org): Ensures women have access to services and protects civil rights.
- **Technology Affinity Group** [www.tagtech.org](http://www.tagtech.org): Builds capacity of the nonprofit sector by sharing the latest high-tech ideas and solutions.
- **Women's Funding Network** [www.wfnet.org](http://www.wfnet.org): This partnership of women's funders is committed to social justice and equal opportunities.
- **Hispanics in Philanthropy** [www.hiponline.org](http://www.hiponline.org): Wants to strengthen Latino communities by increasing resources, leadership and community participation.

## Nonprofit Groups Oppose Combined Federal Campaign Changes

A collation of nonprofits has sent a letter to members of Congress asking them to stop the Office of Personnel Management from making changes to the Combined Federal Campaign, *The Chronicle of Philanthropy* reports. The OPM has announced plans to end its requirement that nonprofits participating in the CFC spend no more than 25 percent of their total revenue on administrative and fundraising expenses. The agency also plans to assign nonprofits new code numbers that will allow federal employees to assign their pledges to specific charities. Thomas Bognanno, president of Community Health Charities of America, told lawmakers that the changes would hurt nonprofits. Bognanno said the changes would damage nonprofit accountability and flood the CFC with "thousands" of new nonprofits that were not previously permitted to take part.

## IRS Panel Looking for Comments on Self-Regulation Plan

The IRS Advisory Committee on Tax-Exempt and Government Entities is taking comments on whether the Internal Revenue Service should create a new self-regulation program for nonprofit organizations. The program would give nonprofits a way to disclose their errors or instances of wrongdoing in the hopes of receiving a reduced punishment for the offence rather than if the IRS had discovered the problem. The committee's survey is available at [www.zoomerang.com/survey.zgi?p=WEB225XPBG55G](http://www.zoomerang.com/survey.zgi?p=WEB225XPBG55G)

## IRS Offers Nonprofits Free Training Online

The Internal Revenue Service has put its workshops and resources for small and mid-size nonprofits online. The Web site is free and requires no registration. The five training modules on the Web site include Tax-Exempt Status – How can you keep your 501(c)(3) exempt?; Unrelated Business Income – Does your organization generate taxable income?; Employment Issues – How should you treat your workers for tax purposes?; Form 990 – Would you like to file an error-free return?; and Required Disclosures – to whom must you show your records? For more, visit [www.stayexempt.org](http://www.stayexempt.org)

U R B A N C O N N E C T I O N ▼

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## Finance Center

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maintain a financial library/lab—a resource to nonprofits in the areas of financial software, policy and procedure templates, and financial manuals.

For information call 414-344-3933 or email [info@nonprofitcentermilwaukee.org](mailto:info@nonprofitcentermilwaukee.org)

### Many reasons for pride

The Nonprofit Center of Milwaukee is proud to launch its new Finance Center. Executive Director Leigh Kunde noted several reasons why: “First, our Finance Center practices what it preaches. It is the result of a carefully honed business plan and intends to be self-sustainable by its fourth year. We will not only teach nonprofit financial success, but also model it.

“Second, the Finance Center has already received significant national and local affirmation. Our business plan finished in the top fifteen percent of plans submitted to the National Business Plan Competition for Nonprofits sponsored by the Yale School of Management. That competition allowed us to use Yale’s judges and consultants to make a good plan great.

“We’ve received significant local affirmation as well. The Helen Bader Foundation provided a three-year, \$75,000 grant that allowed us to launch this initiative. In addition, the financial support of the Forest County Potawatomi Community Foundation, M & I Marshall and Illsley Bank, and the U.S. Bancorp Foundation stand as real votes of confidence in the Center.

“Finally, we have hired a superbly qualified individual to serve as the Finance Center’s Director. We could not be happier to have Linda Austin directing this initiative”.

### Organic growth for the Nonprofit Center

Nonprofit Center Board President Rolunda Nezerin Dixon shares the enthusiasm for the new Finance Center. She believes that the Center’s resources will contribute greatly to improving “integrity, responsibility, and consistency in nonprofit financial matters.”

Dixon is especially happy to see the Finance Center open, since she served for over a year as chair of the Finance Task Group. This task group brought together community and nonprofit leaders, academics, funders, and other experts who worked with passion to research the need, brainstorm the possibilities, and write the initial six-year business plan.

The Finance Center is rooted and expands the established identity and successful service of the Nonprofit Center of Milwaukee, clearly enhancing our mission “to promote the interests and effectiveness of the nonprofit sector”. Nonprofits drawn to the services of our Finance Center may also discover all of the other benefits of membership in the Nonprofit Center.

### For more information

For the most up-to-date information on training opportunities, see the enclosed Training Calendar. Contact Finance Center Director Linda Austin to discuss consulting services and contracted bookkeeping, accounting, and other financial services. She may be reached by telephone at (414) 344-3933, or via e-mail at [laustin@nonprofitcentermilwaukee.org](mailto:laustin@nonprofitcentermilwaukee.org).

## Meet the Finance Center Director

The Nonprofit Center of Milwaukee is pleased to welcome Linda C. Austin as Finance Center Director. Ms. Austin’s expertise, experience, and familiarity with our work singled her out as the ideal person for this position.

Linda was most recently Finance Director of the American Cancer Society (Midwest Division). In that position, she drew upon her broad financial expertise to manage a \$35 million budget process, as well as implement and manage financial policies, reporting, and internal audits. She also ensured that all financial staff were properly trained and managed while directly supervising five financial professionals.

Prior to that, Linda worked for five years as an independent contractor providing a full range of accounting services to nonprofit organizations. In this capacity, she did day-to-day bookkeeping, month-end closings and year-end closings, payroll, and audit coordination. In addition, she trained the permanent staff of her clients.

Linda has worked in the field of nonprofit financial management for over twenty-five years. She is most at home serving mission-driven organizations, and is an outspoken advocate for nonprofit financial integrity and accountability.

Ms. Austin’s involvement with the Nonprofit Center of Milwaukee is long-standing and rich. She served as a member of the Board of Directors for three, two-year terms. She was our Treasurer from 1996 through 2000, and our President for two years after that. She has volunteered as a member of the Center’s training faculty for more than a decade. Linda also served as a member of the Finance Task Group, and as such has really been a part of the Finance Center since its inception.

The Nonprofit Center desired to appoint as Director of the Finance Center an individual with a vision of and commitment to financial excellence in the nonprofit sector. The ideal candidate would possess both financial and managerial skills, and would know well the needs of nonprofit organizations. Such a candidate would further understand the principles of social entrepreneurship and be able to implement a business plan based on those principles. We believe that we have found such a person in Linda Austin, and we welcome her warmly as the Finance Center Director.

# celebrating 40 years

## 1967-2007 RetroBook Will Tell Our Story...and Yours

### Send Old Photos Now! Advertising Deadline is June 15.

The nonprofit sector has come a long way since 1967, the year the Nonprofit Center of Milwaukee was founded as Milwaukee Associates in Urban Development. The Center's 40th Anniversary gives us all a reason to look back on a history of growth and achievement while looking ahead to an exciting future of service to nonprofits and the community.

In July, we'll publish a special 40th Anniversary RetroBook that will highlight the Nonprofit Center and the role it has played working with hundreds of area nonprofits over the years. Our story is really the story of the sector, too, so RetroBook features include a timeline of important events sector-wide, a retrospective on the VISTA program and the many individuals who were involved in Milwaukee, and articles on nonprofit stewardship and governance.

The RetroBook is also a way to show support for quality training and other services. Consider taking out advertising space to tell your organization's story to thousands of nonprofits and individuals, to describe your current work, or just to offer congratulations. Ad prices are listed below; placement deadline is June 15.

Your photos representing important events involving nonprofits since 1967 are welcome for consideration as part of the RetroBook timeline. We're especially interested in older photos from organizations in Milwaukee and southeastern Wisconsin that capture significant moments in your history or the history of nonprofit involvement in the community. Photos can be submitted at any time to the address below.

For more information on 40th Anniversary RetroBook space reservations or contributions to the timeline, email [retrobook@nonprofitcentermilwaukee.org](mailto:retrobook@nonprofitcentermilwaukee.org) or call (414) 344-3933. Here's to a happy 40th Anniversary...

#### 40th Anniversary RetroBook Ad Placement Rates

- "Friend of the Nonprofit Center" Name Listing \$40
- Business Card Ad \$100
- 1/6 Page \$150
- 1/4 Page \$175
- 1/2 Page \$275
- Full Page \$500 (inside covers and back cover also available, call for rates)

Please reserve space and submit ad or ad copy by June 15, 2007. For an ad placement form with dimensions and ad specifications, email [retrobook@nonprofitcentermilwaukee.org](mailto:retrobook@nonprofitcentermilwaukee.org) or call (414) 344-3933.

### 40th Anniversary URBAN PICNIC

Friday, July 20, 11:30 a.m. to 1:30 p.m. on the Terrace at Milwaukee's Lakefront Transit Center

Join several hundred friends and help the Nonprofit Center celebrate and enjoy...

- Great Picnic Lunch
- Pleasantly Brief Program including the Nonprofit Center Volunteer of the Decade Award
- Keynote by Peter Goldberg on "The Changing Landscape for Nonprofits"
- Dixieland Jazz
- FREE FESTA ITALIANA TICKETS TO THE FIRST 300 RSVPs!

Tickets: \$50, Nonprofit Center members \$40, children under 14 \$25. Reservations for tables of eight are available. Call (414) 344-3933 for reservations. Rain or shine, join us for some fun!

[www.nonprofitcentermilwaukee.org](http://www.nonprofitcentermilwaukee.org)

[www.volunteermilwaukee.org](http://www.volunteermilwaukee.org)

[www.jobsthatserve.com](http://www.jobsthatserve.com)

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The Nonprofit Center of Milwaukee promotes the interests and effectiveness of the nonprofit sector

M I S S I O N ▼

through strengthening organizational capacity, expanding volunteerism and encouraging collaboration.

URBAN CONNECTION LAYOUT BY DESIGN PLUS GRAPHICS.

### Nonprofit Center

OF MILWAUKEE, INC.  
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United Way of Greater Milwaukee



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