



► 6TH ANNUAL

TCFV FINANCE CONFERENCE

LEADING BY NUMBERS

CELEBRATING TCFV'S 45TH ANNIVERSARY

Day One — Wednesday, March 29, 2023

BREAKFAST ON YOUR OWN

9:00–9:15AM

La Frontera III Ballroom

WELCOME

Deborah Butts - *Finance & Administrative Technical Support Manager, Texas Council on Family Violence*

Rick Brown, Ed. D. - *Chief Executive Officer, Hope Alliance*

9:15–10:15AM

La Frontera III Ballroom

Barriers to Change in Your Organization

Froswa' Booker-Drew

What is getting in the way of the change you would like to see in your organization? Change happens in nonprofit organizations either too quickly or too slowly, and the process often is not managed well.

Learning Objective:

- » Learn the tools that can assist in creating the change you would like your organization to experience.

10:15–10:30AM

WELLNESS BREAK - Stretch and take care of yourself

10:30–11:30AM

La Frontera III Ballroom

Effective & Efficient Back Offices

Sean Hale - *Consultant, Hale Consulting*

Sean covers 4-6 actionable ideas you can take back to your organization to help run the office more smoothly. You will practice the concepts in this interactive keynote and have fresh ideas.

Learning Objectives:

- » Identify savings and efficiencies in your organization
- » Work smarter, not harder
- » Improve leadership engagement with financial data

continued on next page...

11:30–12:00PM
La Frontera III Ballroom

NETWORKING OPPORTUNITY

Deborah Butts - *Finance & Administrative Technical Support Manager,*
Texas Council on Family Violence

12:00–1:00PM
La Frontera III Ballroom

LUNCH PROVIDED

1:00–2:00PM
La Frontera III Ballroom

Budgeting Part 1: The Big Picture

Sean Hale - *Consultant, Hale Consulting*

Building a successful budget requires more than Excel skills and a good template. In the best budget processes, the board and staff are aligned on their roles and the budget's purpose, the organization chooses frugality over cheapness, people collaborate objectively through difficult choices, and they are prepared for wild cards. Time permitting, Sean will include reserve funds, cost of living adjustments, handling unbudgeted situations, and other tips.

Learning Objective:

- » Learn to build a successful budget process
-

2:00–2:15PM

WELLNESS BREAK - Stretch and take care of yourself

2:15–3:15PM
La Frontera III Ballroom

2022 TCFV Compensation Report: *Building Longevity in Our Movement*

Jessica Moreno, LCSW - *Managing Partner, Collective Capacity Consulting, LLC*
Elizabeth Jenkins, MSIOP - *Consultant, Collective Capacity Consulting, LLC*

TCFV has collected salary related data from member programs since 1991. The most recent iteration of the salary survey explores key themes related to salaries, organizational budgets, staff retention, and the intersecting impacts of COVID. Join us as Jessica and Elizabeth reflect on key themes from the 2022 TCFV Building Longevity in Our Movement Compensation Report and recommendations for staff retention.

Learning Objectives:

- » Review key findings from the TCFV Report
 - » Explore staff retention strategies
-

3:15–3:30PM

WELLNESS BREAK - Stretch and take care of yourself

Day One — Wednesday, March 29, 2023

(continued)

3:30–4:30PM

La Frontera III Ballroom

(continued) 2022 TCFV Compensation Report

Jessica Moreno, LCSW - Managing Partner, Collective Capacity Consulting, LLC

Elizabeth Jenkins, MSIOP - Consultant, Collective Capacity Consulting, LLC

4:30–4:45PM

La Frontera III Ballroom

WRAP UP

Deborah Butts - Finance & Administrative Technical Support Manager,
Texas Council on Family Violence

During this wrap-up, Deb explains the next day's schedule and might even share a joke. Enjoy your evening.

Day Two — Thursday, March 30, 2023

8:00–9:00AM

Pick your breakout session - A or B

La Frontera III Ballroom

A. Board Fiduciary Responsibilities

Holly Raymond - Consultant

Sitting on a nonprofit board is a feel-good service to the community but comes with many responsibilities that should be discussed with potential candidates upfront. Holly discusses board members' fiduciary duties to your organization and that you have to them as the financial staff. There are many things that the finance staff of a nonprofit organization must consider daily. The finance staff's responsibility to their board is among the most important.

Learning Objective:

- » Explore key fiduciary duties of board members as they join in serving your mission.

Austin Room

B. Employee Retention Credits for Nonprofits

Kelsey Vatsaas, CPA, MBA - Managing Principal, CliftonLarsonAllen (CLA) LLP

Many nonprofits are eligible for Employee Retention Credits (ERC) for the periods of 2020 and 2021 based on reductions in gross receipts, the impact of shutdowns on operations, or a mix of both. Nonprofit eligibility can be complicated to navigate.

Learning Objective:

- » Learn how to evaluate eligibility, what the benefits could be, and how to go about claiming the credits.

9:00–9:15AM

WELLNESS BREAK - Stretch and take care of yourself

continued on next page...

9:15–10:15AM*Pick your breakout session - A or B***La Frontera III Ballroom****A. Nonprofit Lease Implementation Update and Common Practices****Victor Perello, CPA - Audit Director/Manager, CliftonLarsonAllen (CLA) LLP**

The new lease standard is here and in effect! Victor discusses the basics of the new lease standard in addition to highlighting areas specific to nonprofit organizations.

Learning Objective:

- » Learn what you need to do now as your organization prepares for implementation.

Austin Room**B. Budgeting Part 2: Basic Excel Skills****Sean Hale - Consultant, Hale Consulting**

Sean walks through three different budget templates: basic budget, budget by program, and budget by month, and discusses how to use them. Sean provides information to help you determine the best for your nonprofit. Sean also discusses basic Excel skills like adding and deleting rows and columns and basic formulas.

Learning Objective:

- » Explore ways to build your budget in Excel and get the numbers to add up.
-

10:15–10:30AM**WELLNESS BREAK - Stretch and take care of yourself**

10:30–11:30AM**La Frontera III Ballroom****Risk Management****Holly Raymond - Consultant**

Nonprofit operations can have pitfalls around every decision. Holly covers ten key things you need to have in place to mitigate daily risks you and your organization face. Holly also covers risk appetite for the organization as an essential driver in other decisions that are made for operations, including risk frameworks, hiring practices, culture, gift acceptance policies, donor considerations, Committee of Sponsoring Organizations of the Treadway Commission (COSO) internal controls, by-laws, financial and board management.

Learning Objective:

- » Learn the ten key strategies to mitigate risk
 - » Key operation drivers
-

11:30–11:45AM**WELLNESS BREAK - Stretch and take care of yourself**

11:45–12:45PM
La Frontera III Ballroom

Insurance for a Nonprofit
Janet Aguilar - Consultant

What insurance should your organization be carrying? Janet discusses what insurance a family violence nonprofit should carry to safeguard your organization's assets, staff, and board.

12:45–1:45PM
La Frontera III Ballroom

LUNCH PROVIDED

1:45–2:45PM
La Frontera III Ballroom

Funder Panel:

Megan Bermea, MPA, CTCM - Director, Texas Health and Human Services Office of Family Services - Family Violence, Child Advocacy, Human Trafficking

Donald Stout - Victim Services Program Manager, Criminal Justice Division, Office of the Governor

TBA - Grants Administration Division, Office of the Attorney General

Moderator:

Gloria Terry - CEO, Texas Council on Family Violence

Hear from the expert panelists from Health and Human Services Commission (HHSC), Criminal Justice Division (CDJ), and Office of the Attorney General (OAG) as they present updates on the state of funding and answer your pre-submitted questions.

2:45–3:00PM
La Frontera III Ballroom

CLOSING

Deborah Butts - Finance & Administrative Technical Support Manager, Texas Council on Family Violence

Be sure to attend for a chance to win a door prize.

CEUs: 10 hours

CPE (Center for Professional Education) CREDIT FOR CPAs

Texas State Board of Public Accountancy recommends that you complete online the 'Claiming Continuing Professional Education Credits from a Non-Registered Sponsor' form to obtain credit for this conference. The link for the form reporting is: <https://www.tsbpa.texas.gov/forms/non-registered-sponsor.html>

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Speakers



Janet Aguilar served as Vice President of Sales at USI Southwest until her retirement in August 2021. Previously Janet served as the Vice President of Sales, Executive Commercial for Wells Fargo Insurance Services, USA Inc. before USI Southwest acquired it. Aguilar was also a top Insurance agent, shareholder, and partner at Rogers & Belding Insurance Agency.

Some of the Awards and Recognitions that Aguilar has received include the TAMACC Women of Distinction Award – 2015; Hispanos Triunfadores – Business Division – McDonald's Hispanos Triunfadores – 2013; Independent Insurance Agents of El Paso (James F. Elliott) Award – 2008; Texas Latina Entrepreneur Legend Award (Texas Association of Mexican American Chambers of Commerce) – 2008; James Elliott Award – Insurance Agent of El Paso – 2006; SBA District and Regional Women in Business Advocate of the Year – 1997; YWCA Reach Award in Marketing & Sales – 1995; Insurance Woman of the Year – 1982 & 1991; and the TAMACC Texas Latina Entrepreneur Legend Award – 2008.

With over 52 years of experience in the insurance industry, Aguilar made it her mission to reach out to young adults interested in getting into this line of work. Over the years, Aguilar has volunteered and taught insurance classes so that potential agents can achieve the accreditation needed. She has taken these future leaders under her wing by helping them with their certifications. Aguilar inspires women who want to pursue a higher standard of living by becoming committed entrepreneurs in her field. Young women in the borderland region can see themselves in Aguilar and be inspired to create their own opportunities. Her contribution to their professional skills allows them to keep moving forward.



Megan Bermea, MPA, CTCM serves as the Director for the Office of Family Services at the Human & Health Services Commission (HHSC) in Austin, Texas. She provides trauma-informed leadership to the Family Violence Program, Child Advocacy Program, and Human Trafficking Resource Center.

She is appointed to the Governor's Sexual Assault Survivors Task Force, the Attorney General's Human Trafficking Prevention Coordinating Council, and HHSC's Trauma Transformation Team.

Bermea is a summa cum laude graduate of The University of Texas at El Paso with a bachelor's degree in sociology and earned a master's degree in public administration from Texas State University. She is also a graduate of the HHS Executive Leadership Academy, cohort 14.



Froswa' Booker-Drew, Ph.D. has an extensive background in nonprofit management, partnership development, training, and education. As the former Vice President of Community Affairs/Strategic Alliances of the State Fair of Texas, the largest fair in the United States, she managed all community initiatives, educational programming, partnership development, and philanthropy. Booker-Drew served as the National Community Engagement Director for World Vision, US Programs. She has worked for three national nonprofits and was formerly the Texas Office of Partners for Sacred Places Director. Booker-Drew also served as Texas Regional Director for the Innovation Groups, a national nonprofit which offers consultation, training, and research for local governments. She was promoted from Director of the Community Center to Director of Communications/Assistant to the Headmaster at St. Philip's School and Community Center, an organization based in South Dallas, a marginalized community, where she was responsible for all public relations and special projects for the Executive Director.

Booker-Drew is the owner of Soulstice Consultancy LLC, an agency that provides strategic planning, leadership and partnership development, board training, and consultations/coaching for small businesses and nonprofit agencies. She graduated from Oklahoma City University with a Master of Liberal Arts in Humanities. She received her undergraduate degree from The University of Texas at Arlington in History, with a minor in English. Booker-Drew received her Ph.D. in Leadership and Change from Antioch University. She is also an Advanced Certified Coach Practitioner through the Certified Coaches Federation. Booker-Drew is the author of three books, [Rules of Engagement: Making Connections Last](#) (2013), [Ready for a Revolution: 30 Days to Jolt Your Life](#) (2016), and [It's Time to Fly Away](#) (2020). She has authored several articles on various topics published worldwide, including serving as an advice columnist for professional women for the Businesswoman Media, a global platform based in Australia.



Richard M. Brown, Ed.D. was appointed Hope Alliance's Chief Executive Officer on May 1, 2018. Brown is a seasoned nonprofit executive with over 40 years of experience in nonprofit fundraising and executive management. He brings a wealth of knowledge and expertise to the Hope Alliance and the community. He is passionate about changing lives and building futures for those in need. He is highly motivated to further the success of Hope Alliance. He advocates for agile, efficient methodologies, complete transparency, and collaboration among all constituencies. Throughout his career, Brown has served organizations such as the Children's Village in Dobbs Ferry, NY, Special Olympics PA, colleges, and universities in both the "UC" and "Cal State" systems of higher education in the state of California, the United Methodist Foundation for Christian Higher Education, Desert Southwest United Methodist Foundation, the Muscular Dystrophy Association, and Special Olympics Texas. Brown served these organizations in various capacities, from Development Director to Consultant to National Vice President to CEO. During his career, Rick has raised more than \$1 Billion for those in need. Brown graduated from Temple University with a Doctorate in Education and a minor in Marketing. He also graduated from The Pennsylvania State University with an M.S. in Outdoor Education and a B.S. in Therapeutic Recreation.



Deborah Butts is a proud Texas Council on Family Violence employee, working as the Finance and Administrative Technical Support Manager. She has extensive work experience encompassing budgeting, fiscal management, contract development and oversight, policy development, and implementation with federal, state, and local programs, working with elected officials, vendors, subcontractors, and community leaders, and developing and presenting financial training. She received a bachelor's degree in Business Administration from the University of Texas at Tyler. Butts worked for the East Texas Council of Governments for 18 years, then the Tyler Economic Development Council. In the early '90s, she worked as a children's services case manager for the Women's Center of East Texas.



Sean Hale asserts that "Behind every successful nonprofit, you'll find a strong back office." He has served a variety of nonprofits professionally since 1999 and has made improvements that reduced waste, generated new revenue, boosted staff productivity and morale, increased financial transparency, and reduced risk. Over his career, Hale has helped boards and management navigate complex situations and consistently left the organizations stronger and ready for their next growth stage. Today Hale is the founder of Sean Hale Consulting, a nine-person team that helps small and medium-sized nonprofits ensure they have strong, effective accounting and administration. Over the years, he has served on a variety of boards. He currently volunteers as an officer in the Austin Nonprofit and Financial Leadership Group and the League for Nonprofit Human Capital. Hale holds a Master's degree and Certificate in Nonprofit Management from the University of Texas at Austin.



Elizabeth Jenkins is an industrial-organizational (I-O) psychologist passionate about creating and maintaining inclusive and diverse work environments. As a diversity scholar, her research and praxis aim to identify organizational strategies and tools that remove workplace barriers and foster equitable and safe work environments that attract and retain healthy and happy employees. She has five years of experience creating programming, trainings, and conducting qualitative and quantitative research that improves work environments.

Jenkins has a Bachelor of Science in psychology from Howard University and a Master of Science in industrial/organizational psychology from Texas A&M University. She expects to receive her doctorate in industrial/organizational psychology with certificates in advanced research methods, women & gender studies, and Africana studies in May of 2023 from Texas A&M University.



Jessica Moreno, LCSW is a skilled facilitator with a unique experience uniting program management, radical play, community education, leadership development, event planning, and ethical social work practice. Moreno has grown up in the movement to end violence against women, starting as a youth activist for a local domestic violence organization. Over the past 15 years, she has continued that work as a protective order advocate, adolescent counselor, youth programs developer, and community builder. Moreno has worked for local, state, and national organizations - all centering the experiences of young people in intergenerational approaches to community building and violence prevention. Moreno has channeled all her expertise into becoming a nonprofit consultant. Moreno says, "Partnering with programs and communities heals her soul; when programs excel and grow, she also grows." In her free time, she serves on the Board of Jane's Due Process, a reproductive justice nonprofit serving minors across Texas.



Victor Perello, CPA is a Director/Manager in CliftonLarsonAllen's private industry group. Perello focuses his time serving clients primarily in the retail industry. Perello's background is auditing and accounting for several industries, including retail, manufacturing and distribution, bio-techs, oil & gas, governments, and nonprofits. Perello has more than 18 years of experience in public accounting and industry. He has extensive experience serving various clients of all sizes, including large publicly traded fortune 100 companies, privately-owned commercial businesses, and local nonprofits in the San Antonio community. He has served the San Antonio community and surrounding areas for the entirety of his career and assisted numerous clients with implementing new accounting pronouncements and consulting on interpretations and their financial reporting vs. business impact. Perello is a CPA in Texas and possesses a Bachelor of Science in accounting and a Bachelor of Business Administration in accounting from Texas Lutheran University in Seguin, Texas.



Holly Raymond serves as the Chief Financial Officer for Upbring, a statewide organization whose mission is to break the cycle of child abuse. Raymond is responsible for the finance, facilities, budget, and procurement functions, as well as information technology, fundraising, and risk. Raymond is a UT Austin graduate and has spent her entire career in Central Texas, focusing on bringing efficiencies to nonprofit operations.



Donald Stout is the Victim Services Programs Administrator within the Governor's Public Safety Office. Stout began his career in grant management in the Office of Research Accounting at Texas Tech University as Chief Accountant. From there, Stout worked as a grant accountant in the Vice President for Research's Office at the University of Houston. Stout began his tenure with the Governor's Office in 2016 as the grant manager for VAWA-STOP and SASP awards, then in 2019, became the associate administrator on the Victim Services team, serving in that position for three years. Stout received two Bachelor of Business Administration degrees from Texas Tech University, focusing on Management and Marketing with minors in Government and Spanish.



Gloria Aguilera Terry joined the Texas Council on Family Violence (TCFV) in January 2008. In her role as the CEO, she guides and directs the statewide activities of TCFV. The organization advises the Texas Legislature, establishes, and fosters statewide tactical partnerships, works with staff to provide outstanding services to programs, and strategically positions TCFV to create the influence necessary to continue serving the needs of victims and their families. Terry came to TCFV from El Paso, Texas, where she served as the Executive Director of the Center Against Family Violence (CAFV), a significant border community domestic violence program with a 1.8 million dollar budget and a staff of fifty employees. Among her major accomplishments at CAFV, she made the agency a respected and high-profile organization, obtained funding to create proactive health services, and was successful in obtaining the agency's first transitional living center. She also served as the Senior Vice President of Finance and Administration for the Greater El Paso Chamber of Commerce. Terry, a 2003 Leadership Texas graduate, holds a B.B.A. from the University of Texas at El Paso and has extensive community service experience.



Kelsey Vatsaas, CPA, MBA is the managing principal of the national nonprofit industry. Over her career at CliftonLarsonAllen, Vatsaas has been a nonprofit auditor, strategic consultant, assessment provider, and consulting CFO. In her current role, Vatsaas works to bring the firm's national resources, teams, and experiences to over 10,000 nonprofits for whom CLA provides a variety of services. Vatsaas possesses a Master of Business Administration from the University of St. Thomas, Minneapolis, Minnesota, and a Bachelor of Science in accounting from Northwest Missouri State University, Maryville, Missouri.

TEXAS COUNCIL ON FAMILY VIOLENCE PROMOTES SAFE AND
HEALTHY RELATIONSHIPS BY SUPPORTING SERVICE PROVIDERS,
FACILITATING STRATEGIC PREVENTION EFFORTS, AND CREATING
OPPORTUNITIES FOR FREEDOM FROM DOMESTIC VIOLENCE.

