

2021 Get on Board

Saturday, February 27, 2021

SPEAKERS & PANELISTS



Joshua Joachim, American Red Cross
Topic: Nature of Nonprofits, Board Roles, & Responsibilities
9:00AM-10:00AM

Joshua is the regional chief executive officer for the American Red Cross of Louisiana. Joshua started his involvement with the American Red Cross as a community volunteer following the landfall of Hurricane Katrina in 2005. Over the past 14 years, he has held statewide and multi-state leadership positions in the organization. Prior to his work with the American Red Cross, Joshua served as polymer chemist in the petrochemical industry in both Louisiana and Mississippi.

Joshua is passionate about developing leaders and serving the community. He is a graduate of the New Orleans Leadership Institute-class of 2020 and the National American Red Cross LEAD cohort. He is an active member of several business and community groups. He also serves on several for-profit and not-for-profit board and advisory groups. Joshua is a graduate of Louisiana State University, Baton Rouge and lives in New Orleans with his wife Elizabeth, and daughter Darian.



Elaine Garvey, CPA, ACA, Postlethwaite & Netterville

Topic: Board Effectiveness- Best Tips & Common Pitfalls

10:15AM-11:15AM

Elaine Garvey, CPA, ACA, is a Director in P&N's Accounting and Assurance Services Group of the firm's New Orleans area practice. With over 20 years of public accounting experience, Elaine works primarily with not-for-profits, higher education institutions, and professional services firms, providing internal and external audit services, accounting guidance, and assistance with other business needs. She has helped clients implement new accounting standards, new systems, and new organizational structures.

Prior to joining the P&N team, Elaine worked with PwC in the UK, San Francisco, and Los Angeles. During this time, she served public and private companies, and organizations in the not-for-profit sector. Elaine also co-authored the second edition of the IIA and PwC publication "Board Effectiveness — What Works Best" and contributed to the fourth edition of "Audit Committee Effectiveness — What Works Best".

Elaine is passionate about sharing knowledge and best practices with clients and the business community and is a frequent speaker at P&N-hosted seminars and webinars for financial officers and not-for-profit leaders. She has presented on current accounting hot topics and board governance related matters.

Additionally, Elaine serves on several not-for-profit boards, which provides her with the opportunity to give back to her community and gain valuable insight into not-for-profit operations, which elevates the level of service she delivers to her not-for-profit clients.

Because of her impact on the New Orleans community, Elaine was recently named one of *New Orleans CityBusiness's* "Women of the Year" for 2019.



Charlie Heim, Heim Consulting
Topic: Board Leadership in Fundraising
11:30AM-12:30PM

- Professional Experience:
 - Former teacher, guidance counselor and coach, Jesuit New Orleans. (1966-70)
 - Coach of only undefeated (24-0) J.V. Basketball Team in history of Jesuit High School (1967-68)
 - Director of Public Relations, Jesuit New Orleans (1970-72)
 - In fund raising for 48 years:
 - First Director of Development, Jesuit High School of New Orleans. (1972-73)
 - Directed the Planned Gifts Program, Tulane University. (1973-77)
 - Inaugurated the Development Program, Ohio Valley Medical Center, Wheeling, West Virginia. (1977-80)
 - Ochsner Foundation, New Orleans, Vice President, Philanthropy - retired. (1981-2007)
 - Consultant to Not-for-Profits (d.b.a. **Heim Consulting** since 2008)
 - Executive Director, The Catholic Foundation, Archdiocese of New Orleans (2013-2016)
- Professional Organizations, offices, accreditations:
 - Fellow, Association for Healthcare Philanthropy FAHP. (1983)
 - Association of Fundraising Professionals (AFP) member since 1972, President of the New Orleans Chapter and International Board Member (1985), AFP-NO Treasurer (2009-11)
 - Association for Healthcare Philanthropy (AHP) member since 1977. Chairman (1989)
 - Chairman of the Board of Trustees of the AHP Educational Foundation. (1993-94)
- Honors:
 - Gamma Theta Upsilon, National Professional Geographic Fraternity. (1965)
 - Kappa Delta Pi, Honor Society in Education. (1969)
 - Prep – Frey & WBOK – PR man of the Year. (1972)
 - ECHO Award from the Direct Marketing Association. (1983)
 - Outstanding Fundraising Executive by the Louisiana Chapter of AFP. (1986)
 - Harold J. (Si) Seymour Award, the highest honor in the profession of healthcare philanthropy. (1992)

- Role Model, Young Leadership Council of New Orleans. (2008)
- Volunteer:
 - Archdiocese of New Orleans Development Implementation Team
 - Past Chair, Archbishop Hannan High School Board of Directors.
 - Past Chair, Rozelle Award Committee Touchdown Club of New Orleans.
 - Former member, University of Southern Mississippi Foundation.
- Teaching:
 - Former Adjunct Professor at the University of New Orleans.
 - Lecture on fund raising methodologies.

Panel Discussion

Gain insight and perspective from professionals and experienced nonprofit board members as each panelist shares their path to nonprofit involvement and volunteerism and lessons learned along the way

1:00PM-2:30PM



Leigh Thorpe, Moderator
 Vice President of Corporate Partnerships
 National Urban League

Panelists



Belinda Fly
 Co-Founder of
 F&L Organizational
 Support Services, Inc.



Megan Kiefer
 Secretary of the
 Board of Directors for
 Court Watch NOLA



Katherine Raymond
 Past President of the
 Board of Directors for
 Junior League New Orleans

Belinda Gail V. Fly is the Co-Founder of F&L Organizational Support Services (F.L.O.S.S.) – www.WeAreFLOSS.org – a nonprofit organization increasing capacity and organizational effectiveness through fiscal sponsorship, training and development. F.L.O.S.S. partners with mission driven charitable projects and organizations to further develop the mission while providing support to their infrastructure-building process with a focus on the development of financial management systems and systematizing the operations of the project or organization.

Belinda is also the President, Creator and Senior Consultant of HR, Board & More – www.HRBoardMore.com – a for-profit consulting business helping small businesses, nonprofits, charters schools and faith-based organizations with human resources, board governance and operations. She facilitates board trainings, board retreats and strategic planning sessions, collaborating with nonprofit boards, senior management, founders and co-founders.

Belinda has worked in the nonprofit management, human resources and board governance space for more than 20 years. Her work spans across the social justice, faith-based and education spaces. She believes in working collaboratively while ensuring compliance to federal, state and local laws.

Partial Client List: Voice of the Experienced (VOTE), Step Up Louisiana, Operation Restoration, Opportunity to Restore, YouthForce NOLA, LA Museum Foundation, VAYLA New Orleans, Audubon Charter School, LA Chapter National Lawyers Guild, The Data Center, Triumphant 2Gether (FL), FedFam4Life (FL), Success Prep Academy

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Leigh Morgan Thorpe serves as Vice President of Partnerships and Advancement at The National Urban League. She oversees all corporate and foundation partnerships and sponsorships across the country in support of the League's strategic initiatives.

Prior to joining the NUL staff in February 2019, Leigh served as Associate Vice President of Annual Giving and Membership for The National WWII Museum, with oversight of a 165,000+ Member program, as well as the Museum's Fundraising Events team and its Memorial Brick program.

Leigh also had a long tenure with United Way of Southeast Louisiana, most recently serving as Senior Vice President of Resource Development and Marketing, and immediately following Hurricane Katrina, serving as Director of its Women's Leadership Council (now Women United) and Director of Corporate Partnerships, respectively.

Before re-joining the United Way family in 2014, Leigh acted as Managing Director of Projects With Purpose, a community relations firm facilitating partnerships between companies and communities in need across the country, creating customized philanthropic events for businesses and conferences. She also served as the Sr. Community Relations Associate for

Capital One Bank, managing all associate volunteerism and community engagement within Louisiana.

As a volunteer, Leigh is a board member of Friends of City Park, where she served as President in 2017 and 2018, and is a board member of the City Park Improvement Association, where she currently serves as Special Events Chair. Leigh is also the Immediate Past President of the Loyola University Alumni Association, and previously served as Chair of the Loyola Loyal alumni giving campaign and President of Loyola's Young Alumni Pack, being named Volunteer Young Alumna of the Year in 2009. She is an Advisory Board member of Dress for Success New Orleans, and a Board Member of the Junior League of New Orleans, serving as its Planning and Development Council Director. Leigh also serves on the Executive Leadership Team of the American Heart Association's Go Red for Women fundraising campaign.

In addition to her work with the before-mentioned organizations, Leigh has served on the boards of Le Petit Theatre, Save Our Cemeteries, and the Committee for a Better New Orleans. She has chaired or assisted with fundraisers for Liberty's Kitchen, the Young Leadership Council of New Orleans, the Emeril Lagasse Foundation, the Louisiana Hospitality Foundation, the New Orleans Center for the Creative Arts, Children's Hospital, the New Orleans Family Justice Center, the Big Easy Foundation, Hogs for the Cause, the Preservation Resource Center, Café Reconcile and SBP (formerly St. Bernard Project).

Leigh received her degree in Journalism from Loyola University New Orleans in 2003. She is a graduate of both the Center for Nonprofit Resources' BoardsWork board training program, which she also co-chaired for two years after being brought back under the umbrella of the Junior League of New Orleans, and the Committee for a Better New Orleans' Metropolitan Leadership Forum. In Fall 2016 Leigh was named one of New Orleans' "40 Under 40" by Gambit Weekly.

Megan Kiefer is a partner at Kiefer & Kiefer. She is a trial attorney who specializes in personal injury, insurance defense, and appellate work and who has a proven track record in and out of court. Megan has experience as lead counsel in jury trials, judge trials, and mediations, as well as extensive experience in oral advocacy. She has successfully argued cases before many Louisiana District and Federal Courts as well as Appellate courts. Her defense clients include major insurance and transit companies. She represents individuals who have been injured in accidents. She has handled cases involving car accidents, motorcycle accidents, trucking accidents, severe spinal injuries, traumatic brain injuries, wrongful death, sexual harassment and assault, high profile defamation, surgeries, and more. She prides herself on the fact that she gives her clients her undivided attention with a personal touch; she provides her personal cell phone number to answer any questions her clients may have about their case at any time. She enjoys the fact that most of her cases end with a hug, since helping people is what got her into the practice of law in the first place.

Megan was recognized in 2017 as one of the Top 10 Personal Injury Attorneys under 40 in the country by the National Academy of Personal Injury Attorneys, and in 2018, she was named as one of the Top 10 Personal Injury Attorneys in Louisiana by Attorney and Practice Magazine. She received a Leadership in Law Award from New Orleans City Business in 2017, recognizing both her legal accomplishments and community contributions. She has been listed as a Superlawyer Rising Star in 2017, 2018, 2019, and 2020, and has been inducted into the Litigation Counsel of America. Megan has lectured on many legal topics, including Bad Faith issues in insurance law, how to litigate personal injury matters following an automobile collision,

uninsured motorist coverage, as well as putting on evidence of pain and suffering damages at trial. She is on the adjunct faculty at Tulane University Law School, where she teaches Trial Advocacy.

Megan's pro bono work has focused on Constitutional law issues, including Fourth Amendment litigation, as well as the representation of veterans and indigent clients in immigration proceedings, eviction proceedings, and in domestic violence matters. Megan has also been active in LGBT impact litigation and has assisted in filing briefs with the United States Supreme Court, Ninth Circuit Court of Appeals, and Inter-American Court of Human Rights regarding issues such as LGBT discrimination and same-sex marriage.

Megan graduated at the top of her class at Tulane Law School with an Order of the Coif distinction. There, she served as Senior Associate Editor and Board Member of the Tulane University Law Review, as well as a Board Member of Moot Court and the Lambda Alliance.

Megan resides in Bywater and is active in the local political community. She serves on the Board of Court Watch NOLA and the Louisiana Center for Women in Government and Business and is a member of various local organizations. Megan is a repeated volunteer with the Second Harvest Food Bank, teaching a Cooking Matters class at the Keller Library and at Warren Easton High School. She serves as a chairperson of the New Orleans chapter of the American Foundation for Suicide Prevention Out of the Darkness walk. She is a graduate of Mount Carmel Academy in Lakeview and is active in the alumnae association.

Megan is a certified mediator, receiving her certification from Humboldt University in Berlin, Germany.

Katherine Kleinpeter Raymond, Ph.D. is a professor of practice and co-director of undergraduate studies in the Biomedical Engineering (BME) Department at Tulane University, teaching such courses as Statics, Mechanics of Materials, service learnings for Product and Experimental Design and Team Design, and the senior capstone Team Design course. She holds a Ph.D. in civil engineering from Tulane University's former School of Engineering, researching high-performance concrete bridge girders. Her interest is in blending mechanics with medical innovation and service opportunities to allow students a unique approach to learning. She co-directs Biomedical Innovation for Global Impact (BIG Impact), which involves undergraduates in global experiences designing to improve healthcare in low-resource communities. She serves on several committees, such as the steering committee of the Grand Challenge Scholars Program and is a member of professional organizations including the Society of Women Engineers (SWE).

In the community she serves on the boards of the Foundation for Science and Mathematics Education (supporting Sci High), Trinity Episcopal School, the Tulane University Women's Association, as vice-president of the Women's Exchange (supporting Hermann-Grima and Gallier Historic Houses), and as co-personnel advisor for the Chi Omega Rho Chapter Advisory Board. A graduate of the 2014 NORLI class, she was honored as a YLC role model in 2015 and has chaired fundraisers for such nonprofits as the American Cancer Society and PRC. She is past president of the Junior League of New Orleans. A lifelong New Orleanian, her family includes husband Beau and 3 daughters Sydney, Charlotte, and Kate.