

AGENDA
Navigating the World of Uncertainties
Impacting ERM in Nonprofit Organizations
February 20, 2025 1pm-4pm EST

1:00-1:05pm Welcome from NC State and GRF

Mark S. Beasley, Alan T. Dickson Distinguished Professor of Accounting and Director of the ERM Initiative | NC State University
Jackie Cardello, Managing Director | GRF CPAs & Advisors
Melissa Musser, Partner and Director, Risk & Advisory Services | GRF CPAs & Advisors

1:05-1:30pm Executive Perspectives on Top Risks

Mark S. Beasley | NC State University

1:30-2:00pm The Complex Risk Environment for Nonprofits in 2025

Amy Boland, Partner and Director of Audit Services | GRF CPAs & Advisors
Tricia Katebini, Partner | GRF CPAs & Advisors
Max Manley, Partner | GRF CPAs & Advisors

2:00-2:30pm Beyond Risk Identification and Assessment: Competency-based Training for Risk Owners

Paul Miller, Management Analyst, National Institutes of Health
Facilitator: Ricardo Trujillo, Partner | GRF CPAs & Advisors

2:30-2:40pm Break

2:40-3:25pm Escaping Common Risk Management Traps

Ruth Rhoads Allen, President | CDA Collaborative Learning
Lindsay Hamsik, Senior Director, Risk Management | HIAS
Kim Valente, Chief Financial Officer | StrongMinds
Facilitator: Andreas Alexandrou, Partner | GRF CPAs & Advisors

3:25-3:55pm How Foundations Are Thinking About ERM

Kim Matheson, former Director, Enterprise Risk Management | Margaret A. Cargill Philanthropies
Facilitator: Amy Wares | GRF CPAs & Advisors

3:55-4:00pm Closing Remarks

Mark S. Beasley | NC State University
Melissa Musser | GRF CPAs & Advisors

Co-hosted by