

Leadership Saratoga Post

Winter 2007

www.leadershipsaratoga.org

Issue 13



Leadership Saratoga's website:
www.leadershipsaratoga.org

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- Jennifer Joseph Perry '06
- Michael Wallner '06
- Linda Toohey: Program Director

March of Wines Fun-Raiser Leadership Saratoga Scholarship Fund and Reunion

Thursday, March 8th

6:00-8:00 PM

New York State Military Museum

Details Inside Newsletter

The Learning Continues!

THE ADVANCED LEADERSHIP ALUMNI SEMINAR

Wednesday, January 24th

8:00—10:00 AM

***Topic: Reading Financial Statements, Con-
flicts of Interests and Audit Committees***

Presenter: Michael Wallner, MSHA

Details Inside Newsletter

also inside:

- class of 2007 update
- new reporting requirements for smaller not-for-profits
- alumni notes
- nomination form for Lisa Miles Distinguished

March of Wines Fun-Raiser

Got Wine?

If you bring a bottle of wine (and we really, really hope you do!!) you will receive a raffle ticket for the opportunity to win even more wine!!

Thursday, March 8th

6:00 - 8:00 PM

\$40 Per Person

Heavy Hors D'oeuvres, Wine Raffle, Live Auction

A brief presentation on wine and the Military Museum will be included in the evening.

March Madness, Cabin Fever, the Winter Blues...there's no better time to get out and catch up with your fellow alumni and learn about wine at the same time.

New York State Military Museum

*61 Lake Avenue
Saratoga Springs, NY*

*Please RSVP by:
Friday, March 2nd*

*584-3255 or Email: info@saratoga.org
(Checks may be made payable to Leadership Saratoga Alumni Assn.)*

Bragging rights go to the class with the most attendees!!!

***March on down and don't forget to bring your favorite wine
(suggested value \$10-\$20 range)***

Pins for Sale

If you have lost your Leadership Saratoga pin, or have a "relic" with our old logo, treat yourself to a new pin. Cost is \$5 per pin. You can send a check payable to the Leadership Alumni Association to Linda Toohey, Saratoga County Chamber, 28 Clinton St., Saratoga Springs, NY 12866 and she'll send you one.

LS Post

Alumni Notes

Please **email** me information for upcoming newsletters at: **MAGICRSS@aol.com (Cathy Allen)**. This is one of the most popular sections of the newsletter, so keep the updates flowing! Don't be shy!!!

Ray O'Connor '89 has been named President-Elect of the Independent Bankers Association of New York State. He'll be president for the 2007-08 fiscal year. **Stan Lukas '90**, retired for almost six years now from the U.S. Marshals Service, is training with the Business Training Center, Military Order of the Purple Heart Service Foundation (MOPHSF) for a new online career. The MOPHSF program is available to Purple Heart recipients and disabled veterans and allows these veterans to update their business and computer skills in order to secure meaningful positions. Any veterans among Leadership alumni that are interested in the program or the organization are invited to visit the MOPHSF website at: www.purpleheartfoundation.org. **Anne Rockwood '98** received the Habitat for Humanity of Schenectady County's "Volunteer of the Year Award". Congratulations for the well deserved award and, also, on the engagement of your son and his upcoming Fall '07 wedding. **Dr. Chris Mathiesen '00** was awarded Fellowship in the American College of Dentists. Only 3.5% of all dentists are Fellows. Chris is a past president of the Fourth District Dental Society. He's also chair of the Saratoga Springs Zoning Board, and a member of the Leadership Saratoga Advisory Board. **Kathy Schechner '03** gave birth to her second daughter, Kathleen (Kate) in July. **Dan Collins '03** became a parent for the first time with the arrival in September of Dylan. **Beth Moeller '03** was appointed to the Dean's Council for the School of Arts & Sciences at Clarkson University. Beth reports Saratoga Independent School (SIS) celebrated the dedication of their new building in late October. She acknowledged a lot of work from SIS community members including a few Leadership Saratoga alums: **Lu Lucas '89**, **Margaret Roohan '89**, and **Alisa Dalton Wager '02**. **Maria Dailey '03** and family and friends hosted the 5th Annual Christopher Dailey Turkey Trot on Thanksgiving. Approximately 1,300 people participated in this wonderful event which benefited the Christopher Dailey Foundation and its efforts to support youth sports in the area. Details about the Turkey Trot, the recent construction of the new gymnasium in Wilton, and other activities of the foundation can be viewed at www.christopherdaileyfoundation.com. **Cathy Allen '03** along with several other area Real Estate Agents served on the committee for the First Annual Realtors' Ball. The October event raised money for the restoration of the Universal Preservation Hall. **Cathy, Jen Joseph Perry '06**, and **Gary Ferguson '06** are new board members of DVRC (Domestic Violence and Rape Crisis Services for Saratoga County). **Kristen Andrie Berdar '04** has officially changed her name to Kristen Berdar and is officially back at work after officially having a baby boy three months ago. Her new email address is kberdar@bstco.com. **Denise Romand '04**, was chosen by the American Cancer Society Cancer Action Network (ACSCAN) to lead a delegation of eight Legislative Ambassadors for Relay For Life Celebration on the Hill September 19 - 20 from Congressman Sweeney's district. Ambassadors from every congressional district across the United States were represented. "Our voices will be heard loud and clear. Our goal is to work with Congress to make cancer a national priority," Romand said. "With an estimated 19 people diagnosed with cancer in Saratoga County each week and seven who die each week due to cancer, we need to speak out for the sick, for those who don't have the courage or means to do so and for those whose voices have been silenced to cancer." You can make a difference in the fight by advocating for cancer. For more go to www.acscan.org or www.celebrationonthehill.org. **Brit Bassinger '04** reports he is Vice Chair of the Northumberland Planning Board and at work was recently promoted to the role of Director of Landscape Architecture/Saratoga Office. **Carrie Lord '04** was named to the Board of Managers of the Southern Saratoga County YMCA for a three year term. She also gave birth to her second child. **Kelly Waechter '04** moved into a new position at State Farm as a Finance Supervisor overseeing the Cash Management and Complaint Tracking units. Kelly was also appointed as Secretary for the Catholic Charities Board. **Caroline Russell Smith, '04** has been presenting an eight week course called The Saratoga Stress Reduction Program which aims to help people respond to stress, disease, chronic pain, and mood disorders with greater clarity and calm. The class is held four times per year and is covered by most health insurances. For more info, please visit www.SaratogaStressReduction.com or contact Caroline at 857-9361. **Katherine Culbert '06** was named Director, Business and Development of the National Museum of Dance. **Kim Copenhaver '06's** business, Copeland Environmental, LLC was recently awarded three separate NYS term contracts to provide ecological and environmental consulting services as a prime subcontractor. Her company's website is: www.copelandenvironmental.com

Class of 2007 Update

To commence the 2006-2007 Leadership Saratoga program, we travelled to Jiminy Peak for a two day retreat in the beginning of September. Linda, Lilly Hewitt and Bob Wright wasted no time breaking the group down, assembling us into teams, and providing activities that forced us to work together and utilize the team's strengths. Each team demonstrated tremendous energy, enthusiasm, and a competitive drive (which also led to some intense events). Whether it was cramming all 24 of us into a six foot circle (talk about getting to know your classmates in a hurry), reviewing each of our "lifelines", leading each other blind folded through the woods, or guiding our classmates under, over, and through a rope fence - we all learned a great deal about ourselves and each other in a short amount of time.

The momentum the class gained during the retreat continued to grow into our first session where we had the privilege of having General Bill Martin present "Dynamics of Leadership." This session was very interactive and allowed for many questions and positive discussions. General Martin stressed that to effectively lead you need to earn the trust of the group by forming relationships and personally interacting with them. His many experiences and advice for effective leadership will be helpful for all going forward.

In the next session, we had the opportunity to experience some of what Saratoga County had to offer. Gavin Landry and our classmate Greg Dixon guided us through a tour of some of the attractions in the County - specifically:

National Museum of Racing and Hall of Fame
Saratoga Performing Arts Center (including back stage)
Saratoga Automobile Museum
Saratoga Race Course
Tang Teaching Museum
Saratoga National Historical Park
Saratoga National Cemetery

These sites coupled with the background Gavin and Greg provided reiterated how fortunate we are to live in Saratoga County.

Lastly, Saratoga County has many organizations with a variety of needs. As part of our program Linda reached out to several of these organizations for projects with which they would like assistance. In response to her request we received the following four projects:

The Children's Museum at Saratoga (CMAS)

Develop and help produce a comprehensive 2 year marketing plan including the redesign and printing of the current museum brochure and the creation of a promotional video.

National Museum of Dance

Research, develop, plan and implement a new exhibit for 2007.

AIM Services, Inc.

Develop a marketing and PR plan to increase awareness of AIM's mission and community impact.

Saratoga Springs History Museum

Develop a membership program designed both to gain and retain membership.

Each group seemed genuinely excited to begin working on these projects and I am sure the organizations will be pleased with the end results.

At this stage of the program, I think it is fair to say that Leadership Saratoga has exceeded our expectations. Through our experiences in each session, and the people we have had the opportunity to interact with (including each other) this truly has been an enjoyable experience and we look forward to the remainder of the program.

Submitted by Ben Towne '07

LEADERSHIP ALUMNI ADVANCED SEMINAR

Reading Financial Statements, Conflicts of Interests and Audit Committees

Wednesday, January 24, 2007

8:00 – 10:00 a.m.

Saratoga County Chamber Board Room

\$25 per person – Payable in advance

Non-Members—\$50 per Person

Are you a Board Member looking to gain a better understanding of the ins and outs involved in the Finances of your organization? Join your fellow alums and get an overview of everything you need to know about Financial Statements but are afraid to ask. Learn more about key financial statements, what they mean and how they relate to one another. Discover what the important financial ratios are, what they mean and how they are calculated. Warning, participation in this session may cause an unusual fear of red ink and uncontrollable obsession with wingtips! Ask your Doctor if this class is right for you.

Learn more about your duties and responsibilities as a board member when it comes to conflicts of interests. What policies and procedures should be in place to minimize risk? Are your current disclosure requirements stringent enough in today's regulatory environment? Learn how boards should handle conflicts of interest when they arise, and the need to clearly define what it means to be a dependent or independent board member. Also, learn more about what an Audit Committee is and the increasing roles they play in the not-for-profit industry.

Presenter: Michael Wallner, MSHA

Mike has spent the past 16 years of his career working in the Health Care Finance profession. Mike has held numerous positions at Saratoga Care Inc., and Affiliates in the Fiscal Services Department and took on the role as the Director of Corporate Compliance in October 2002. His current position is the Director of Financial Planning and Corporate Compliance. Mike has a Bachelor of Science Degree in Accounting and a Master of Science Degree in Health Care Administration. A recent graduate of Leadership Saratoga, Mike is a member of the Leadership Alumni Board, volunteers his time with Clifton Park baseball and football and is also Co-Director of the Run for the ROC. Outside of work and volunteering, Mike enjoys playing with his son Griffin, running, drumming and punning.

Pre-registration is required. Please send a check with your payment, which will confirm your reservation to Linda Toohey, Saratoga County Chamber of Commerce, 28 Clinton St., Saratoga Springs, NY 12866, no later than Monday, January 22nd.

Important Information on New IRS Reporting Requirements for the Smaller Not-For-Profits

Since many of the Leadership Saratoga Alums sit on Boards of many sizes, we thought we'd let you know that in August of 2006, as part of the 800+ pages of the Pension Protection Act of 2006, new rules were implemented regarding the annual reporting requirements of the smaller tax-exempt organizations.

For years beginning after 2006 all tax-exempt organizations that did not have to file annual informational income tax returns (Form 990 or 990EZ) because the organization did not have gross receipts in excess of \$25,000, must now annually provide, in electronic form, certain contact and financial information to the Internal Revenue Service. The Internal Revenue Service is expected to issue regulations describing the manner in which this filing will have to take place.

This change in the law was sparked by recommendations made by the Panel on the Nonprofit Sector, a panel formed in part to recommend improvements over the governance of the non-profit sector. One of the Panel's reports indicated that the Internal Revenue Service's record of organizations qualified to receive tax deductible contributions under Section 501(c)(3) contained outdated information for the organizations who do not have an annual filing requirement. In an effort to ensure these organizations are still functioning and still eligible to have tax exempt status, it was recommended that a basic annual filing be required for the tax exempt organizations that are exempted from filing an actual informational tax return.

According to the new law, the IRS will be requesting information relating to the legal name of the organization and any other name the organization does business under, the mailing address and web-site of the organization, the taxpayer identification number of the organization, the name and address of the principal officer, and information regarding the annual receipts of the organization evidencing the organization's continued exemption from filing an annual tax return. Also, if a tax exempt organization ceases to operate, it must notify the IRS of such an occurrence.

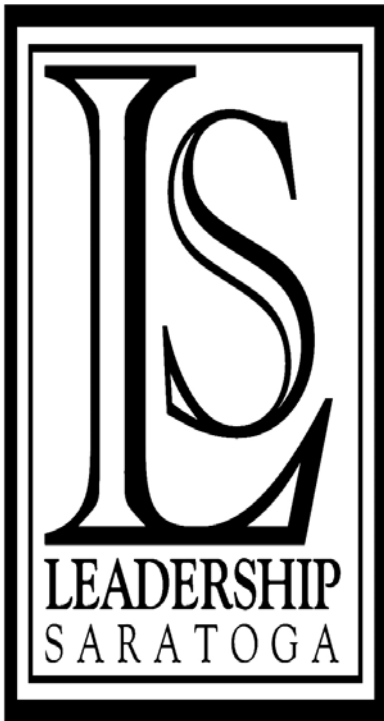
If a tax exempt organization fails to file its notices for more than three consecutive years, the organization will automatically lose its tax exempt status.

To date, the IRS has not issued regulations relating to the form and manner of this electronic filing requirement, but you should be aware that these new notification requirements are out there and that they are effective for periods after 2006.

Editor's Note: A special thanks to attorney Tara Pleat ('06) for providing this helpful information.

Mark Your Calendars

The next **Advanced Leadership Seminar** following the January 24th session, will be held **Tuesday, March 13th from 8:00—10:00 am**. The topic is **"Managing the Generation Mix—Applying Leadership Styles to Different Generations"**. It will be presented by **Sue Malinowski '04**, Director of Education at Saratoga Hospital. This will be a fascinating two hours delving into how best to manage and work with people of different ages - because we're clearly not all the same!



Volunteer Opportunities

The Saratoga County Citizens Committee for Mental Health is seeking members of its Board of Directors. The group meets the first Thursday of every month from September through June. The meetings are held from 5:30 – 6:30 p.m. at the TSA Building located on Union St. in Saratoga Springs. Board members help with reviewing grant applications, assisting with educational events and other activities. The right person is passionate about improving mental health services in the County. If you are interested, please contact SCCCMH Board members and Leadership alums Peggy Lounsbury (plounsbury@saratogacare.org or 583-8371) or Caroline Russell Smith (cruss112@nycap.rr.com or 857-9361).

The Domestic Violence and Rape Crisis Services of Saratoga County (DVRC) is planning their 25th anniversary gala, scheduled for Saturday, August 18th at the Canfield Casino in Saratoga Springs. They are looking for committee members to help plan the event. If you are interested in getting involved, please contact Jennifer Perry at jperry@saratoga.org or 584-3255.



Snapshots from the fabulous Fall Mixer at the Mouzon House. Come join us for the March Fund-raiser and Reunion. You'll have fun!!!

Alums as Volunteers

Although we are all busy serving on boards or committees of organizations, it was suggested at a recent meeting of the Alumni Association Board that it might be fun for groups of Leadership alums to work together on one-time projects. In this way, you'd be getting to know other Leadership participants past and present, while serving a charitable organization.

If you are putting together a team for a one-time event such as to run in a 5K, rebuild a house, run a membership drive or whatever, consider putting together a Leadership Saratoga team. Use your alumni directory, the contacts within your own class, and this publication to see if you can get a group together.

LEADERSHIP SARATOGA ALUMNI ASSOCIATION
NOMINATION FORM FOR
LISA NILES DISTINGUISHED LEADERSHIP AWARD

The Alumni Association Board is seeking nominations for the Lisa Niles Distinguished Leader of 2007. The award is named in memory of Leadership's first Alumni Association President. The recipient will be announced at the Leadership Alumni Association's "Fun Raiser". He or she will receive a recognition gift, and a contribution of \$500 will be made to the charity of his or her choice.

Selection criteria include someone who is a graduate of Leadership Saratoga who "has made significant and notable contributions for the betterment of his/her community/county." Please give us the name of your nominee, as well as your reasons why this person should be selected.

Please return this form to Linda Toohey **no later than Friday, January 19th**. This doesn't give you a lot of time, so.... before this piece of paper gets mixed in with all the others on your desk, please think for a moment, and jot down your choice. You can make it easy and fax or email the application to Linda at the address below. The selection of this coming year's recipient will be made by the previous Distinguished Alums, and will be ratified by the Leadership Saratoga Alumni Association Board.

Thanks!

Name of Nominee: _____

Why you are nominating this person (include their volunteer and board work if you know it):

Please return to: Linda Toohey
Saratoga Chamber of Commerce
28 Clinton St.
Saratoga Springs, NY 12866

Or FAX to 580-1650 or e-mail at ltoohey@saratoga.org