



## A Special Training Series

### Core Excellence Workshop Series 2024

This special multi-session program is designed to address the 6 critical components needed for professional management of a not-for-profit.

Perfect for new and seasoned **Executive Directors, Organizational Leaders, and Board members**, these sessions allow you to tackle implementation of core areas of professional nonprofit management in one structured series. The program will provide handouts and downloadable, customizable tools & templates that can be immediately implemented in your agency. Included in the series is a 7<sup>th</sup> complimentary virtual session in which the process to complete a BBB Accreditation will be reviewed.

#### FOUNDATIONAL SESSIONS \*full session details on back of flyer

- *Reviewing Your Board Structure*, build strong board leadership – Sept 19; 8:30 - noon
- *Ensuring Your Financial Stability*, build tools to monitor resources – Oct 3; 8:30 - noon
  - *Developing Your Strategic Plan*, build a plan to plan – Oct 17; 8:30 - noon
  - *Building Your Staff Structure*, build a team to reach goals – Oct 31; 8:30 - noon
- *Building Your Annual Marketing Plan*, build a plan to communicate – Nov 14; 8:30 - noon
- *Building Your Annual Fundraising Plan*, build a plan to fundraise – Dec 5; 8:30 - noon
  - *Achieve Your BBB Charity Accreditation* – Dec 12; 9 – 10:30 a.m. (virtual)

All sessions will be held in-person at the BSC, except final session on Dec 12

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### Core Excellence Bundle Package - \$300.00

*Bundle includes price discount for all 7 sessions, downloadable tools & templates, networking with peers, and the comprehensive content necessary for professional management of a nonprofit.*

Register and pre-pay online by **September 15th** at [www.mvnonprofitcollaborative.org/events](http://www.mvnonprofitcollaborative.org/events)

**\*Note:** Registration for the Bundle may be made by an individual or an agency; substitutions may be made. As all sessions are appropriate for teams to attend together, additional attendees may register for individual sessions for \$60 each

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For questions, contact Jenny Warner at [info@mvnonprofitcollaborative.org](mailto:info@mvnonprofitcollaborative.org) or 937.477.2438

**Reviewing Your Board Structure** - Recovering from the effects of the COVID-19 pandemic, our nonprofits need strong boards more than ever. From the structure of your board, to the make-up and diversity of its members, to committee structure and governance practices, join this session to ensure your Board of Directors has what it takes to lead your organization into the future. Facilitator: Nina Vasiliu, Gaslight Nonprofit Solutions

**Ensuring Your Financial Stability** - In today's climate, organization leaders must adjust their approach to monitoring financial performance and financial decision-making. In these uncertain times it is vital an organization effectively manage its resources to ensure financial stability and sustainability. In this session, we will review a plan to manage cash flow, raise funds, contain costs and monitor financial performance. You'll receive cash flow analysis template, budget analysis template, key performance metrics worksheet and a copy of the presentation materials. Facilitator: Brady Ware & Co.

**Developing Your Strategic Plan** - You wouldn't take a road trip without a GPS, why show up to work every day without a plan? An effective strategic plan need not be lengthy or complicated but should clearly guide the decisions nonprofit leaders make each and every day. Join us as we walk through the first steps of strategic planning and create a "Plan to Plan" for your organization covering the basics of the strategic planning process and using breakouts to craft your unique planning approach. You'll receive a downloadable, customizable Strategic Planning Template and Handouts. Facilitator: Nina Vasiliu, Gaslight Nonprofit Solutions

**Building Your Staff Structure to Ensure Results** - Attend this session to learn how to convert Strategic Plan Goals & Objectives into staff performance goals, how to hold team members accountable to those goals, how to help ensure your staff manage their time to stay focused on those goals, and how to measure and report progress against those goals. You can then use the downloadable, customizable Goal Setting & Tracking templates we provide to begin documenting performance expectations and measuring results! We'll even discuss how to reassign work based on strengths rather than traditional roles to get the best results for your organization. Facilitator: Jenny Warner, Warner Hargrove Consulting

**Building Your Annual Marketing Plan** - Setting up an annual marketing plan (and following it!) allows the message you are trying to communicate to translate in the best way possible. Too little planning and messaging can be jumbled, confusing, or worst yet not known/published. Join us as we walk you through Annual Marketing Strategy development and help you to create a plan of your own. Featured will be breakout time working in groups to identify the key events, important dates, and messaging of your organization to help you begin planning out your year. You can then use the downloadable, customizable Annual Marketing Template we provide to begin documenting your plan! Facilitator: Lissa Cupp, Big Rocks of Life

**Building Your Annual Fundraising Plan** - If we learned anything from the COVID-19 crisis, we understand without a doubt that having a good fundraising plan for your organization is imperative. As the old saying goes, if you don't know where you are going, any road will take you there. As we continue to operate and provide critical services during this unprecedented time of global change, we must be intentional about the road we take, be more creative and flexible, without losing sight of the fundamental truths about fundraising. You'll receive a downloadable, customizable Annual Fundraising Template and Handouts. Facilitator: Dona Vella, DONAtions, Inc.

**Achieve your BBB Charity Accreditation** – Trust is a key factor to any important relationship and donors are no exception. A BBB Charity Accreditation and a comprehensive online profile for your organization can be a tool to reinforce trust in your donor relationships. After completing the Core Excellence Workshop series, your organization has already invested in many of the elements a charity accreditation seeks. Therefore, included in your registration fee for the series, BBB will provide this complimentary virtual session to walk through key elements of the process. This is an ideal place to ask questions and receive tips, tools, and templates to keep it simple. Facilitator: Christy Mauch, BBB