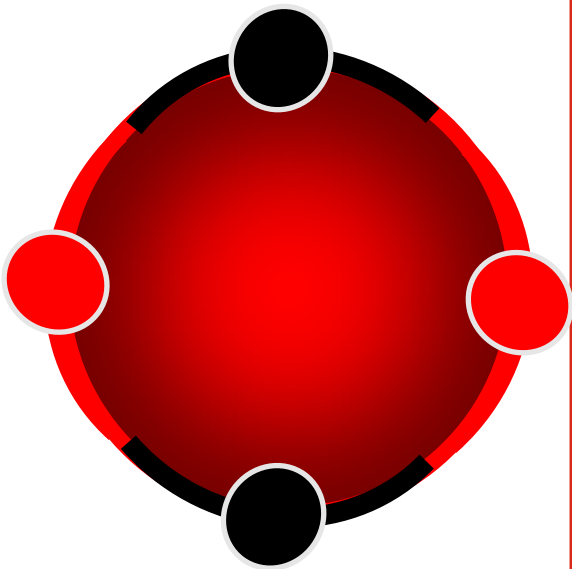


2017

Training Calendar

Training & Consulting Services

A Program of United Way Peterborough & District



Building Strong Organizations & Community Leaders

Through professional development opportunities tailored to meet the unique needs of the non-profit sector.



Dear Colleagues,

Welcome to the 2017 edition of United Way's training calendar.

Our ongoing commitment to your organization is to offer training opportunities that are timely and responsive to your needs. Our professional development training program is updated annually, and is based on feedback received throughout the year, as well as trends within the non-profit sector. We continue to collaborate with trainers and content specialists to provide high quality training relevant to your work. Training programs are designed to suit adult learners by offering small class sizes and an interactive learning environment.

Capacity building supports continuous development of individuals and excellence in the non-profit sector. United Way Peterborough & District is committed to working with all local non-profit agencies to enhance the capacity of the sector through training and consulting. We work with board members, staff, and volunteers to develop the skills and knowledge needed to be effective and responsible leaders.

As a non-profit agency, United Way Peterborough & District understands the challenges of non-profit leadership in an environment of rapid change and increasing demands for accountability. Our Board Governance Series features proven, nationally recognized materials developed by United Way Canada in partnership with local expertise. We possess a deep commitment to this community, your agency, and your volunteers.

The training opportunities outlined in this calendar are designed to enhance your capacity to be a stronger leader, create a stronger organization and build a stronger community.

Sincerely,



Lisa Smith
Director, Philanthropic Impact
United Way Peterborough & District

Organizational Training Needs Assessment and Organizational Development Plans (Free Service)

We use a 70 question survey to identify opportunities for growth within your organization. Using this information we create a detailed report outlining areas and training required to improve your effectiveness.

Community Workshops

We offer training to agency staff and Board members on a variety of topics to build the capacity of your organization.

Customized Training Solutions

Tailored workshops can be created to meet the most pressing needs of your organization.

Management Assistance

6 months of customized mentoring, working one-to-one with an experienced facilitator.

Telephone and In-Person Consultation (Free Service)

Do you have a pressing governance or organizational management issue that requires timely advice or guidance? Call the United Way to receive immediate assistance.

Tools, Templates and Resources (Free Service)

The United Way has a wide range of resources to assist your organization with everything from policy development to marketing.

Strategic Planning and Facilitation Services

The United Way can provide professional facilitators to lead you in creating strategic plans or to provide general facilitation of meetings, think tanks, seminars, etc.

Onsite Organizational Assessments

This intensive process of organizational problem solving and staff development is available to lead your organization to effective and strategic organizational change.

For more information about any of the above programs contact:

Lisa Smith
Director, Philanthropic Impact
United Way Peterborough & District
(705) 742-8839 ext. 29
lsmith@uwpeterborough.ca

2017 Training Overview

Organizational Management

	Date	Cost	Page
Marketing Techniques	June 6	\$30	

Board Governance Series

	Date	Cost	Page
Board Roles & Responsibilities	September 26	\$30	
Creating and Maintaining an Effective Board Team	October 3	\$30	
Strategic Planning for Non-Profit Boards	October 10	\$30	
Financial Oversight for Non-Profit Boards	October 17	\$30	
Human Resource Stewardship for Non-Profit Boards	October 24	\$30	
Generative Thinking – Reframing Governance	November 7	\$30	

Lunch and Learn Events

	Date	Cost	Page
Writing A Grant Proposal	June 15		
Effective Minute Taking	November		
Stress Management	November 21		
Event Planning	December 7		

Marketing Techniques

Who Should Attend:

Executive Directors
Fundraisers

Date and Time:

June 6, 2017
6-9pm

Buy Tickets Here**Location:**

Lions Community Centre
347 Burnham Street
Peterborough, ON

Cost: \$30.00

Get the most out of your non-profit marketing efforts by having a well-organized and strategic marketing plan. Marketing allows you to meet your audiences where they are, physically and mentally, This session will help you answer key questions, improve your messaging, and create your non-profit marketing plan.

By the end of this session you will be able to:

- Learn strategies to identify, cultivate, and build solid relationships with prospective donors
- Construct an environment that allows your organization to be more resourceful in diversifying funding sources
- Create a scenario where your organization can meet all of your clients' needs and funders' expectations

Your Facilitator is: Heather Watson

Heather leads acorn30 with her passion for brand engagement, public relations excellence and all things digital. Through her extensive knowledge in digital marketing, social media and campaign management, Heather has emerged as a Peterborough Chamber of Commerce "Top 4 Under 40" winner in 2015. A graduate of Fleming College's Business Administration program for Marketing and Human Resources, Heather has 20 years proven experience with both public and private sector marketing research, marketing strategy and service delivery fulfillment leveraging a full suite of traditional marketing platforms with digital innovations.

Board Roles & Responsibilities

Who Should Attend:

Board Members and Executive Directors

Dates and Time:

September 26
6-9pm

Buy Tickets Here**Location:**

Lions Community Centre
347 Burnham Street
Peterborough, ON

Cost: \$30.00

This introductory workshop provides a general overview of what is required for strong board governance. A very useful workshop for those who are new to boards or those looking for a refresher. Course content provided by United Way Canada.

By the end of the session you will be able to:

- Define the role of the board
- Identify the five primary board responsibilities
- Understand the role of the board and senior staff

Your Facilitator is: Eva Kennedy

Eva Kennedy recently retired after over three decades with the provincial government, most recently the Ministry of Natural Resources. Eva led corporate projects, facilitating discussions and collaboratively developing options for resolving difficult situations related to governance issues. Eva has a B.Sc. in Biology, M.Sc. in Zoology and has completed the NFP Governance Essentials Program at the Rotman School of Management, University of Toronto. Among other volunteer activities, Eva sits on the Board of Directors of the Kawartha Land Trust.

Creating and Maintaining an Effective Board Team

Who Should Attend:

Board Members and Executive Directors

Dates and Time:

October 3
6-9pm

Buy Tickets Here**Location:**

Lions Community Centre
347 Burnham Street
Peterborough, ON

Cost: \$30.00

A non-profit board should lead the organization as a team, establishing a balanced working relationship in which they understand and respect each other. Learn how your board can become a cohesive team enhancing strategic direction and effectively solving problems. Course content provided by United Way Canada.

By the end of the session you will be able to:

- Identify components of the board building cycle
- Identify and implement elements of board recruitment
- Develop strategies to assess the effectiveness of the board
- Develop a positive board culture

Your Facilitator is: Bill Templemen

Bill is a self-employed program designer, writer and facilitator. He has expertise in the areas of experiential training design, process facilitation, coaching, organizational effectiveness, transition management, career renewal and staff/management training, with an emphasis on team-building and leadership development.

Strategic Planning for Non-Profit Boards

Who Should Attend:

Board Members and Executive Directors

Dates and Time:

October 10
6-9pm

Buy Tickets Here**Location:**

Lions Community Centre
347 Burnham Street
Peterborough, ON

Cost: \$30.00

Effective planning and evaluation are key indicators of successful organizations. Research has shown that organizations committed to these practices achieve higher membership levels, lower staff turnover and successful volunteer recruitment and retention programs. Discover how your organization can create a cohesive vision that will shape its future and achieve its goals.

By the end of the session you will be able to:

- Understand the importance of planning and evaluation
- Identify the framework required for effective planning
- Describe and implement effective criteria for setting goals
- Distinguish between performance and outcome-based evaluation

Your Facilitator is: Eva Kennedy

Eva Kennedy recently retired after over three decades with the provincial government, most recently the Ministry of Natural Resources. Eva led corporate projects, facilitating discussions and collaboratively developing options for resolving difficult situations related to governance issues. Eva has a B.Sc. in Biology, M.Sc. in Zoology and has completed the NFP Governance Essentials Program at the Rotman School of Management, University of Toronto. Among other volunteer activities, Eva sits on the Board of Directors of the Kawartha Land Trust.

Financial Oversight for Non-Profit Boards

Who Should Attend:

Board Members and Executive Directors

Dates and Time:

October 17
6-9pm

Buy Tickets Here**Location:**

Lions Community Centre

There is increasing pressure for non-profit organizations to ensure financial accountability. Determining and tracking accurate program costs, keeping track of costs once a program is underway, and reporting to managers, Boards, and funders in a meaningful way, is an increasingly important challenge for non-profit organizations.

By the end of the session you will be able to:

- Define the oversight role of the Board
- Identify strategies to establish budgets and monitor expenses
- Read a financial statement and identify questions to ask
- Identify required policies, and reporting systems

Your Facilitators are: Martin Barclay and Lynn Marie Landry**Martin Barclay**

Martin has over 25 years combined experience working in Government and not-for-profit agencies. He is a community facilitator

347 Burnham Street
Peterborough, ON

Cost: \$30.00

for both gender based violence workshops and financial administration and board governance for local non-profit agencies workshops. Martin has been the One Roof Food Service Training Program Support to the Head Chef/Admin lead and has a political science degree from Trent University.

Lynn Marie Landry

Lynn maintains her own private practice and holds her LLM (Masters Degree in Law). In addition to maintaining a private practice she teaches courses in law. She has practiced both as a private defense counsel and as a prosecutor with the Ministry of the Attorney General.

Human Resource Stewardship for Non-Profit Boards

Who Should Attend:

Board Members, Executive Directors, and Human Resources staff

Dates/Times:

October 24
6-9pm

Buy Tickets Here



Location:

Lions Community Centre
347 Burnham Street
Peterborough, ON

Cost: \$30.00

Learn what it means to be an effective steward of one of your organization's most important assets—your staff.

During this session you will learn to:

- Understand the Board's role as an employer
- Understand and comply with current legislation
- Develop policies and procedures for effective HR Management
- Plan for the future through strategic thinking around HR

Your Facilitators are: Cathy Berges & Bill Templeman

Cathy Berges

Cathy has over 25 years of leadership and management experience, with a background in Organizational Development and Strategic Planning. Cathy has a Certificate in Departmental Management from the Canadian Hospital Association and a Certificate in Management from the Ontario Hospital Association.

Bill Templeman

Bill is a self-employed program designer, writer and facilitator. He has expertise in the areas of experiential training design, process facilitation, coaching, organizational effectiveness, transition management, career renewal and staff/management training, with an emphasis on team-building and leadership development.

Generative Thinking - Reframing Governance

Who Should Attend:

Board Members and
Executive Directors

Dates and Time:

November 7
6-9pm

Buy Tickets Here**Location:**

Lions Community Centre
347 Burnham Street
Peterborough, ON

Cost: \$30.00

To ensure an organization is moving in a more long-term, sustainable direction, boards need to start 'reframing' the questions they ask of themselves, as well as how they view and evaluate their purpose. This means looking past the fiduciary and strategic duties of a board into the realm of generative thinking.

This session will explore the concept of generative governance and delve into why this practice is good for your board.

During this session you will learn:

- What 'generative' governance can do for your organization
- Strategies to 'reframe' a boards mindset during meetings
- Promote robust discussions
- How to avoid struggles during transition

Your Facilitator is: Lisa Smith

Lisa Smith is the Director, Philanthropic Impact for United Way Peterborough & District. She holds a Bachelor of Business Administration and a Certificate of Human Resource Management. Lisa has over 18 years of experience working in the non-profit sector in areas such as program management, board governance, and organizational development.

Writing a Grant Proposal

Who Should Attend:

All interested staff and volunteers

Date and Time:

June 15
12-1pm

Buy Tickets Here**Location:**

Lions Community Centre
347 Burnham Street
Peterborough, ON

Cost: \$15.00

The proposal writing process is part of almost every nonprofit organization's world. Successful proposals can provide a substantial and meaningful funding source. Yet, the term "proposal writing" almost inevitably invokes reactions of fear, mystery, eye rolling, sighing or panic. This highly interactive workshop will focus on demystifying the proposal writing process. Participants will enhance their proposal writing skills and gain the tools and techniques required to prepare effective proposals.

Your Facilitator is: Lisa Smith

Lisa Smith is the Director, Philanthropic Impact for United Way Peterborough & District. She holds a Bachelor of Business Administration and a Certificate of Human Resource Management. Lisa has over 18 years of experience working in the non-profit sector in areas such as program management, board governance, and organizational development.

Effective Minute Taking

Who Should Attend:

Board Members
Executive Directors

Date and Time:

November 16
12-1pm

Buy Tickets Here**Location:**

Lions Community Centre
347 Burnham Street
Peterborough, ON

Cost: \$15.00

Meetings are a crucial part of organizational leadership...Even more important are the minutes of those meetings. Minutes record Board decisions and it is vital that they are clear, concise and accurate. This seminar will help minute takers to understand their role and responsibilities while learning effective minute taking techniques.

By the end of this session you will be able to:

- Understand the role of minute taker and how to work effectively with board chairs
- Develop and practice skills in active listening and note taking
- Develop and practice writing minutes in various styles
- Understand Rules of Order and their impact on minutes
- Develop action plans in response to meetings

Your Facilitator is: Cathy Berges

Lisa Smith is the Director, Philanthropic Impact for United Way Peterborough & District. She holds a Bachelor of Business Administration and a Certificate of Human Resource Management. Lisa has over 15 years of experience working in

Lunch and Learn Events

the non-profit sector in areas such as program management, board governance, and organizational development.

Stress Management

Who Should Attend:

All interested staff and volunteers

Date and Time:

November 21
12-1pm

Buy Tickets Here**Location:**

Lions Community Centre
347 Burnham Street
Peterborough, ON

Cost: \$15.00

Participants will learn how stress impacts our daily lives. Participants will learn about the difference between positive and negative stress and how each has an impact on our mental health. In this session, the audience will also review simple coping mechanisms to better manage their negative symptoms of stress.

Your Facilitator is: Jack Veitch

Jack is the Health Promoter and Educator with the Canadian Mental Health Association, Haliburton, Kawartha, Pine Ridge Branch. Jack is a graduate from the University of Ontario with a degree in Criminology. Jack has worked with his local CMHA Branch for nearly ten years in various roles including; Supportive Housing, Community Support, Forensic Case Management and most recently Health Promotion. Jack teaches a variety of certificate courses including; Mental Health First Aid, Mental Health Works, safeTALK, Applied Suicide Intervention Skills Training and Living Life to the Full. Jack was also part of the team that created the CMHA/Ontario Hockey League "Talk Today" program, in which he currently works at the Peterborough Petes Mental Health Coach. As well, Jack is a certified Psychological Health and Safety in the Workplace Advisor.

Planning an Event?

Who Should Attend:

All interested staff and volunteers

Date and Time:

December 7
12-1pm

Buy Tickets Here**Location:**

Lions Community Centre
347 Burnham Street
Peterborough, ON

Ten Steps to Managing a Successful Event

You will be provided with insights and additional skills to minimize the time, cost and pitfalls associated with organizing your next event. Special emphasis will be placed on the tools needed to ensure priorities and timelines are on track.

What will be covered?

- Event administration
- Event logistics
- Professionalism
- Marketing
- Risk management
- Staffing an event

Your facilitators' are: Joanne Sokolowski and Alison Scholl

Joanne and Alison are Trent University's event planning queens. Over their time at Trent, they have planned Convocation ceremonies, public lectures, galas, media announcements,

Lunch and Learn Events

Cost: \$15.00

dinners and almost everything in between. Their extensive experience has given them an appreciation of the details, an understanding of the big picture, and the ability to move from idea to execution. Before Trent, Joanne worked for the City of Toronto's Special Events Department, and she has a BA in Art Administration from the University of Toronto. Alison came to Trent from the agency world in Toronto. She has a BA in Canadian History from Nipissing University and a Public Relations Certificate from Humber College.

Registration Information

Space is limited, register early to avoid disappointment. Follow the links embedded in this document to use our online registration system. If you have difficulty registering online, please contact the United Way at (705) 742-8839.

Payment Information

Payments for courses will be made online at the time of registration. A small processing fee is applied to your course fee.

Cancellation by Participant

If your plans change, you may designate a substitute to take your place, or you may transfer to a different event with 48 hours [two (2) business days] notice. Timely cancellation allows someone on the waiting list to attend. Failure to show will result in a loss of course registration fee.

Cancellation by United Way Peterborough & District

All sessions require a minimum of five (5) participants to run. United Way Peterborough & District will provide at least 48 hours [two (2) business days] advance notice of a session cancellation. Registrants will be provided with a credit to attend any other training session of their choice in the event of a cancellation.

Your Privacy is Important to Us

United Way Peterborough & District is committed to protecting the privacy and confidentiality of your personal information. The information you provide may be used to periodically send information about United Way, invite you to future training events and/or information sessions, or to fulfill your information requests. We do not sell or rent our contact lists. For complete details on our privacy policy visit www.uwpeterborough.ca or call 705-742-8839.