



## **Building Strong Organizations & Community Leaders**

**through professional development  
opportunities tailored to meet  
the unique needs of the  
non-profit sector**

**2015 Training Calendar**

### **Training & Consulting Services**

**A Program of United Way Peterborough & District**

Dear Colleagues,

Welcome to the 2015 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 based on feedback received throughout the year, as well 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, Community Impact  
United Way Peterborough & District

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### Organizational Management Series

	Date	Cost	Page
Facilitative Leadership	February 10	\$25	4
Marketing Techniques	March 10	\$25	4
Winning Collaborations	April 7	\$25	5
Good Governance 101: Key Principles that Liberate, Motivate & Generate Results	May 13	\$75	6

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### Lunch and Learn Events

	Date	Cost	Page
Budget Oversight Basics	February 26	\$15	13
Developing Policy & Procedure Manuals	March 26	\$15	13
Effective Minute Taking	April 23	\$15	14
Project Management Tools: Project Agreements	May 28	\$15	14
Developing Effective Board Orientation Programs	June 11	\$15	15

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## 2015 Fall Training Overview

### Board Governance Series

	Date	Cost	Page
Board Roles & Responsibilities	September 8	\$25	7
Creating and Maintaining an Effective Board Team	September 15	\$25	7
Strategic Planning for Non-Profit Boards	September 22	\$25	8
Financial Oversight for Non-Profit Boards	September 29	\$25	8
Human Resource Stewardship for Non-Profit Boards	October 6	\$25	9

### Human Resource Management Series

	Date	Cost	Page
Conflict Mediation for Non-Profit Leaders	October 27	\$25	12
Staff Supervision	November 17	\$25	12

### Lunch and Learn Events

	Date	Cost	Page
Project Management Tools: Stakeholder Identification	October 15	\$15	16
Writing Persuasive Proposals	November 5	\$15	16
Project Management Tools: Tracking Progress	November 26	\$15	17

### Facilitative Leadership

**Who Should Attend:**

Board Members  
Executive Directors  
Senior Managers

**Date and Time:**

February 10, 2015  
6-9pm – [Register Today!](#)

**Location:**

Lions Community Centre  
347 Burnham Street  
Peterborough, ON

**Cost:** \$25.00

Today's managers should strive to become facilitative leaders who coach, network and inspire individuals to get desired results. Learning how to "lead from within" makes it easier for others to communicate, problem solve and accept responsibility.

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

- Facilitate communication to maximize group unity, innovation and team performance
- Manage and calm yourself to diffuse conflict situations by listening with intention and speaking with integrity
- Lead by example by recognizing and removing communication barriers

**Your Facilitator is: Kerri Davies**

Kerri Davies is the manager of development for the local branch of the Canadian Mental Health Association (CMHA)-HKPR). She began working for the CMHA in January 2013. Before that, Kerri spent 13 years working for AON, first as executive director of Royal Gardens and later as executive director of Canterbury Gardens. She is a local champion for mental health and was named business woman of the year for 2014.

### Marketing Techniques

**Who Should Attend:**

Executive Directors  
Fundraisers

**Date and Time:**

March 10, 2015  
6-9pm – [Register Today!](#)

**Location:**

Lions Community Centre  
347 Burnham Street  
Peterborough, ON

**Cost:** \$25.00

Get the most out of your nonprofit 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 nonprofit 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 funder's expectations.

**Your Facilitator is: Jonathan Bennett**

As Principal of Laridae Communications Inc., Jonathan provides experienced, strategic governance, business and communications counsel. Jonathan has many years of non-profit governance experience including terms as the President of the Kawartha Haliburton Children's Aid Society and Committee Chair on the Writers' Trust of Canada Board of Directors.

### Winning Collaborations

**Who Should Attend:**

Board Members  
Executive Directors

**Date and Time:**

April 7, 2015  
6-9pm – [Register Today!](#)

**Location:**

Lions Community Centre  
347 Burnham Street  
Peterborough, ON

**Cost:** \$25.00

An important shift is happening in the way non-profit organizations approach collaboration. No longer is this a result of crisis management or funder requirement – it is a source of strategic alliance to expand services or proactively deal with community level issues. This session will feature case examples of successful collaborations initiated by non-profits involved in community improvement efforts.

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

- Identify collaboration and alliance building models that work
- Overcome the common barriers to collaboration
- Define the roles and responsibilities of collaboration members
- Organize guidelines for developing collaborations and alliances
- Determine how the collaboration will function and decide when it is time to end a collaboration.

**Your Facilitator is: Lenka Petric**

Lenka Petric is a Program Manager with the Ontario Trillium Foundation. Working out of the Peterborough office, her catchment area includes Durham Region, as well as Peterborough, Haliburton, Northumberland and the City of Kawartha Lakes. Her career is focused on the not-for-profit sector, in funding and service provision roles, and she has a particular interest in capacity building, both at the organizational and sector levels.

### Good Governance 101

**Who Should Attend:**

Executive Directors and Board Members

**Date and Time:**

May 13, 2015

9am-4pm – [Register Now!](#)

**Location:**

McDonnel St Activity Centre  
577 McDonnel St.  
Peterborough, ON

**Cost:** \$75.00

Non-Profit organizations operate in an environment of rapid change. As the complexity of the sector increases, so does the need for effective Board governance and accountability. There is no argument that good governance equals organizational effectiveness. So how do we as staff and volunteers develop the type of governance required to ensure we can do our work and fulfill our mission?

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

- Understand the major changes and trends impacting non-profit organizations and the implications of these changes
- Recognize best practices that empower CEOs and staff to create, innovate, and achieve results
- Understand the Board's role in facilitating organizational change

**Your Facilitator is: Lisa Smith**

Lisa Smith is the Director, Community 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 the non-profit sector in areas such as program management, board governance, and organizational development.

### Board Roles & Responsibilities

**Who Should Attend:**

Board Members and Executive Directors

**Dates and Time:**

September 8, 2015  
6-9pm – [Register Today!](#)

**Location:**

United Way Board Room  
277 Stewart Street  
Peterborough, ON

**Cost:** \$25.00

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 is recently retired after over 3 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.

### Creating and Maintaining an Effective Board Team

**Who Should Attend:**

Board Members and Executive Directors

**Dates and Time:**

September 15, 2015  
6-9pm – [Register Today!](#)

**Location:**

United Way Board Room  
277 Stewart Street  
Peterborough, ON

**Cost:** \$25.00

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: Janice Green**

Janice Green has been a resident of Peterborough since 1990. Janice is a graduate of Fleming College's Teacher/Trainer of Adults program and has worked with numerous not for profit organizations as both a trainer and facilitator. Janice has been an active community volunteer for over 20 years and is currently the Chair of the Community Foundation of Greater Peterborough's Board of Directors.



### Strategic Planning for Non-Profit Boards

**Who Should Attend:**

Board Members and Executive Directors

**Dates and Time:**

September 22, 2015  
6-9pm – [Register Today!](#)

**Location:**

United Way Board Room  
277 Stewart Street  
Peterborough, ON

**Cost:** \$25.00

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: Jonathan Bennett**

As Principal of Laridae Communications Inc., Jonathan provides experienced, strategic governance, business and communications counsel. Jonathan has many years of non-profit governance experience including terms as the President of the Kawartha Haliburton Children's Aid Society and Committee Chair on the Writers' Trust of Canada Board of Directors.

### Financial Oversight for Non-Profit Boards

**Who Should Attend:**

Board Members and Executive Directors

**Dates and Time:**

September 29, 2015  
6-9pm – [Register Today!](#)

**Location:**

United Way Board Room  
277 Stewart Street  
Peterborough, ON

**Cost:** \$25.00

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, reporting systems

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

Martin graduated from Trent University with a Degree in Political Science. He spent 27 years in the Ontario Public Service working for the Ministries of Health, Attorney General and Aboriginal Affairs. Projects include land claims negotiation, funding for Six Nations, Algonquins and Williams Treaties, and the Mercury

Disability Board in Kenora. Martin also worked in contract negotiation and administration for 17 years.

Lynn Marie Landry currently teaches courses in law and evidence and is studying toward obtaining her LL.M. (Master's degree in law) in addition to maintaining a private practice. Lynn Marie has practiced both as private defiance 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 6, 2014  
6-9pm – [Register Today!](#)

**Location:**

United Way Board Room  
277 Stewart Street  
Peterborough, ON

**Cost:** \$25.00

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

By the end of the session you will be able 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: Bill Templeman and Cathy Berges**

Bill Templeman is a self-employed program designer, writer and facilitator with 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.

Cathy Berges has over 25 years of leadership and management experience. She has developed expertise 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.

### **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 Program**

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 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. Our Imagine Canada Non-Profit Library is open from 8:30am-4:30pm for reference and research.

### **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 please call Lisa Smith, Director, Community Impact, United Way of Peterborough & District at (705) 742-8839 ext. 29.**

Fleming College and United Way Peterborough & District have collaborated in the development of this leading edge certificate. Practical education and training for new or aspiring executives, managers, and members of boards is offered. Peer collaboration and application of skills and knowledge to individual professional experiences are woven throughout the program. Only available on line through Fleming College.



### Certificate Requirements:

#### Core Courses

**MGMT 109**

**Not-for-Profit Leadership I: Operational Frameworks**

**MGMT 110**

**Not-for-Profit Leadership II: Contemporary Issues & Practices**

#### Elective Courses

##### Choose 1

HR Management Principles

Financial Management

Fundraising as a Management Process

#### **MGMT 110—Not-for-Profit Leadership II: Contemporary Issues and Practices**

This course builds upon concepts and learning experiences from Not-for-Profit Leadership I. Current issues and emerging pressures will be analyzed and applied. This course will examine sector trends and practices related to fund development, policy development, risk management, emerging human resource issues, ethics, law, marketing, project management and work life balance.

Prerequisite: Not-for-Profit Leadership I: Operational Frameworks

Course ID **MGMT 110** (45 hrs.)

**Available on line starting January 2015**

#### **MGMT 109—Not-for-Profit Leadership I: Operational Frameworks**

This course is designed to provide current executives, new or aspiring non-profit managers, members of boards or career changers, an introductory understanding of the fundamental principles, issues and best practices for effective leadership and management of a not-for-profit sector organization. This program provides context-specific knowledge and skills for those already working in a not-for-profit organization, and those wishing to pursue a career in the sector. Discussion, application of skills and knowledge acquired and self reflection are key features of the experiential learning process applied throughout this course.

Course ID: **MGMT 109** (45 hrs)

**Available on line starting Sept 2015**

*To register for this program, contact Fleming College, Continuing Education at 705-749-5530 or 1-888-269-6929, or register online at [www.flemingc.on.ca](http://www.flemingc.on.ca).*

### Conflict Mediation for Non-Profit Leaders

**Who Should Attend:**

All interested Staff and Volunteers

**Date and Time:**

October 27, 2015  
6-9pm – [Register Now!](#)

**Location:**

Lions Community Centre  
347 Burnham Street  
Peterborough, ON

**Cost:** \$25.00

Conflict is inevitable in any workplace. Being able to facilitate conflict to an optimal conclusion is an important skill for non-profit leaders. In this workshop, participants will learn how to communicate effectively, resolve, and refocus conflicts in the workplace with local leadership expert Cora Whittington.

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

- Effectively use key communication skills
- Defuse the emotion
- Refocus the conflict so that the best solutions can come forward

**Your Facilitator is: Cora Whittington**

Cora Whittington has over 20 years of leadership & business experience. In her role at Golden Pathways Leadership and Life Coaching, Cora has delivered over 3000 coaching sessions and specializes in conflict resolution. Cora is also co-facilitator of the on-line training program “Starting Influencing Others or Die Whining”.

### Staff Supervision 101

**Who Should Attend:**

Executive Directors,  
Managers, Supervisors

**Date and Time:**

November 17, 2015  
6-9pm – [Register Today!](#)

**Location:**

Lions Community Centre  
347 Burnham Street  
Peterborough, ON

**Cost:** \$25.00

One of the most difficult tasks a manager has to perform is that of staff supervision. Effective staff supervision includes setting goals and monitoring performance but also involves creating an environment that supports individual strengths. Learn how to support staff, set goals, and manage performance in a way that motivates and focuses your staff.

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

- Manage your staff and supervisees more effectively
- Use templates and tools to help you effectively supervise staff
- Effectively match ability and motivation levels for specific individuals and tasks

**Your Facilitator is: Bill Templeman**

Bill Templeman is a self-employed program designer, writer and facilitator with 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.

### Budget Oversight Basics

**Who Should Attend:**

Board Members  
Executive Directors

**Date and Time:**

February 26, 2015  
12-1pm – [Register Today!](#)

**Location:**

Lions Community Centre  
347 Burnham Street  
Peterborough, ON

**Cost:** \$15.00

Financial management is more than keeping accounting records. It involves planning, organizing, controlling and monitoring financial resources in order to achieve objectives. Sound financial management will involve you in long-term strategic planning and short-term operations planning. This financial planning should become part of your organization's ongoing planning process.

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

- Make effective and efficient use of resources
- Become more accountable to donors and other stakeholders
- Prepare for long-term financial sustainability.

**Your Facilitator is: Martin Barclay**

Martin graduated from Trent University with a Degree in Political Science. He spent 27 years in the Ontario Public Service working for the Ministries of Health, Attorney General and Aboriginal Affairs. Projects include land claims negotiation, funding for Six Nations, Algonquins and Williams Treaties, and the Mercury Disability Board in Kenora. Martin also worked in contract negotiation and administration for 17 years.

### Developing Policy & Procedure Manuals

**Who Should Attend:**

Board Members  
Executive Directors

**Date and Time:**

March 26, 2015  
12-1pm – [Register Today!](#)

**Location:**

Lions Community Centre  
347 Burnham Street  
Peterborough, ON

**Cost:** \$15.00

Perhaps you have been asked to put an organizational policy into writing for the first time, or due to organizational changes you need to revise your existing policies, procedures and handbooks

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

- Describe the difference between policy and procedure including the real purpose of writing policies and procedures
- Determine what policies and procedures should be put into writing and signals to watch for when an “unwritten” policy should be formalized
- Identify legal considerations to keep in mind when writing policies and procedures
- Identify when a policy or procedure should be revised
- Write policies and procedures that sound friendly, yet firm
- Write policies that are clear and free from misinterpretation

### Your Facilitator is: Lisa Smith

Lisa Smith is the Director, Community 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 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:

April 23, 2015  
12-1pm – [Register Today!](#)

### 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: Lisa Smith

Lisa Smith is the Director, Community 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 the non-profit sector in areas such as program management, board governance, and organizational development.

## Project Management Tools: Project Agreements

### Who Should Attend:

Executive Directors  
Senior Staff

### Date and Time:

May 28, 2015  
12-1pm – [Register Today!](#)

How can you successfully develop and gain approval of the statement of the goal and objectives of the project?

In this session we will be looking at tools and techniques to ensure that you are able to;

- Eliciting the true needs of the project
- Understand how to document the project's needs and why this essential
- How to recognize and STOP scope creep!
- Negotiating with the sponsor/funder/board/senior management how these needs will be met



## Lunch and Learn Events

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**Location:**

Lions Community Centre  
347 Burnham Street  
Peterborough, ON

**Cost:** \$15.00

**Your Facilitator is: Sarah Tanner**

Sarah Tanner is a qualified project manager with experience in planning, stakeholder identification and engagement, partnership development, strategic alignment, quality and evaluation initiatives. Sarah is currently working as a supervisor with the Peterborough City-County Health Unit.

### Developing Effective Board Orientation Programs

**Who Should Attend:**

Board Members  
Executive Directors

**Date and Time:**

June 11, 2015  
12-1pm – [Register Today!](#)

**Location:**

Lions Community Centre  
347 Burnham Street  
Peterborough, ON

**Cost:** \$15.00

Nonprofit Boards are constantly changing. New members join when old members leave. People exchange ideas and views as they grow more experienced but without the proper training, these members can be frustrated and ineffective. Effective Board orientation can prevent this.

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

- Train new Board members to take on their roles in the organization both quickly and comfortably
- Help Board members to understand their role, why they were asked to join, and what is expected of them
- Assist new members understand the vision and mission
- Empower the entire Board to feel more motivated to do a better job

**Your Facilitator is: Jonathan Bennett**

As Principal of Laridae Communications Inc., Jonathan provides experienced, strategic governance, business and communications counsel. Jonathan has many years of non-profit governance experience including terms as the President of the Kawartha Haliburton Children's Aid Society and Committee Chair on the Writers' Trust of Canada Board of Directors.



### Project Management Tools: Stakeholder Identification

**Who Should Attend:**

Executive Directors  
Senior Staff

**Date and Time:**

October 15, 2015  
12-1pm – [Register Today!](#)

**Location:**

Lions Community Centre  
347 Burnham Street  
Peterborough, ON

**Cost:** \$15.00

Stakeholder management is critical to the success of every project in every organization I have ever worked with. By engaging the right people in the right way in your project, you can make a big difference to its success. But who are your stakeholders? Stakeholder Analysis is the technique used to identify the key people you need to build a relationship with. You then use Stakeholder Planning to build the support that helps you succeed.

In this session we will look at tools and templates that will help you decide

- Who are your stakeholders?
- What is the power, influence and interest?
- How can you keep your stakeholders informed and interested?

Remember that although stakeholders may be both organizations and people, ultimately you must communicate with people. We will also talk about how you identify the correct individual stakeholders within a stakeholder organization.

**Your Facilitator is: Sarah Tanner**

Sarah Tanner is a qualified project manager with experience in planning, stakeholder identification and engagement, partnership development, strategic alignment, quality and evaluation initiatives. Sarah is currently working as a supervisor with the Peterborough City-County Health Unit.

### Writing Persuasive Proposals

**Who Should Attend:**

Executive Directors  
Fundraisers

**Date and Time:**

November 5, 2015  
12-1pm – [Register Today!](#)

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.

## Lunch and Learn Events

**Location:**

Lions Community Centre  
347 Burnham Street  
Peterborough, ON

**Cost:** \$15.00

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

- Lay the ground work for a winning proposal
- Identify and apply the key elements of a proposal
- Identify the do's and don'ts of proposal writing
- Understand general writing tips and the art of packaging
- Maximize tips and shared insight on preparing a grant application

**Your Facilitator is: Kerri Davies**

Kerri Davies is the manager of development for the local branch of the Canadian Mental Health Association (CMHA)-HKPR). She began working for the CMHA in January 2013. Before that, Kerri spent 13 years working for AON, first as executive director of Royal Gardens and later as executive director of Canterbury Gardens. She is a local champion for mental health and was named business woman of the year for 2014.

## Project Management Tools: Tracking Progress

**Who Should Attend:**

Executive Directors  
Senior Staff

**Date and Time:**

November 26, 2015  
12-1pm – [Register Today!](#)

**Location:**

Lions Community Centre  
347 Burnham Street  
Peterborough, ON

**Cost:** \$15.00

When your to-do list becomes a too long, and much of the list will actually take a long time and multiple people to complete, you need more than a checklist to keep track of it. What you really have is a project, and you need to use tools designed to help you manage this list!

We will talk about easy ways to ;

- Monitoring project performance
- Establishing the project performance and reporting system
- Report project status
- Discover and solve problems

**Your Facilitator is: Sarah Tanner**

Sarah Tanner is a qualified project manager with experience in planning, stakeholder identification and engagement, partnership development, strategic alignment, quality and evaluation initiatives. Sarah is currently working as a supervisor with the Peterborough City-County Health Unit.

### **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, or would like to register for multiple sessions, please contact the United Way at (705) 742-8839.

### **Payment Information**

Payment must be received one week prior to the session to confirm your place. If necessary, phone ahead to make arrangements to pay at the door.

### **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. For a full refund, contact United Way Peterborough & District five (5) business days before the date of the session.

### **Cancellation by United Way Peterborough & District**

All classes 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. Registration fees will be fully refunded for any sessions cancelled by United Way.

### **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](http://www.uwpeterborough.ca) or call 705-742-8839.