



# **Building Strong Organizations & Community Leaders**

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



## **Training & Consulting Services**

A Program of United Way Peterborough & District

**Fall 2018 – Winter 2019 Training Calendar**

October 2018

Dear Colleagues,

Welcome to the Fall 2018 – Winter 2019 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 regularly, 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.

We will make every effort to ensure our sessions are accessible to all and to enable you to participate fully in the workshop. **Please advise us of your accommodation needs minimally one week prior to the date of the workshop.** Or, when registering for a workshop or Lunch & Learn, if you have any accommodation needs, please contact Stephanie Levesque at [slevesque@uwpeterborough.ca](mailto:slevesque@uwpeterborough.ca) or at 705-742-8839 x 32.

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 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**

### Fall Session

<b>Human Resource Management Series</b>	<b>Date</b>	<b>Cost</b>	<b>Page</b>
<a href="#">Staff Coaching</a>	November 7	\$30	4

<b>Lunch and Learn Events</b>	<b>Date</b>	<b>Cost</b>	<b>Page</b>
<a href="#">Writing a Media Advisory &amp; Release</a>	November 8	\$15	5
<a href="#">Reading an Audit – How To's</a>	November 29	\$15	5
<a href="#">How to Chair a Meeting</a>	December 13	\$15	6

### Winter Session

<b>Labour Training Program</b>	<b>Date</b>	<b>Cost</b>	<b>Page</b>
<a href="#">Labour Community Advocate – Level 1</a>	Multiple dates	\$100	10

<b>Board Governance Series</b>	<b>Date</b>	<b>Cost</b>	<b>Page</b>
<a href="#">Board Roles &amp; Responsibilities</a>	January 16	\$30	7
<a href="#">Creating &amp; Maintaining an Effective Board Team</a>	January 30	\$30	7
<a href="#">Financial Oversight for Non-Profit Boards</a>	February 27	\$30	7
<a href="#">Human Resource Stewardship for Non-Profit Boards</a>	March 27	\$30	8
<a href="#">Generative Thinking – Reframing Governance</a>	April 24	\$30	8
<a href="#">Board Boot Camp (All-Day Session)</a>	April 26	\$50	10

<b>Lunch and Learn Events</b>	<b>Date</b>	<b>Cost</b>	<b>Page</b>
<a href="#">Accessibility &amp; Inclusion in the Workplace</a>	January 17	\$15	9
<a href="#">Effective Minute Taking</a>	April 3	\$15	9



### Writing a Media Advisory & A Release – And what is the difference

**Who Should Attend:**

Executive Directors,  
Managers, Staff

**Date and Time:**

November 8  
12 noon - 1 p.m.

**Location:**

Lions Community Centre  
347 Burnham Street  
Peterborough, ON

**Cost:** \$15.00

Does your Non-Profit have an event or a story to tell and you want the local media to know about it? How does your organization stand out in this age of instant communication and shrinking newsrooms? Learn how to effectively incorporate the 5W's – Who, What, Where, When and Why – into your media advisories and releases. Sample media advisories and releases will be made available in the workshop.

**Your facilitator is: Stephanie Levesque**

Stephanie Levesque, United Way Peterborough's Labour Programs & Services Development Officer, has 14 years' experience as a newspaper reporter and has been on the other side, writing media advisories and media releases for a variety of organizations.

### Reading an Audit – But I'm not the Treasurer!

**Who Should Attend:**

Board Members, Staff

**Date and Time:**

November 29  
12 noon – 1 p.m.

**Location:**

Lions Community Centre  
347 Burnham Street  
Peterborough, ON

**Cost:** \$15.00

Your non-profit board has just been handed a completed financial audit ...now what? There is a Statement of Financial Position, a Statement of Operations and Changes in Fund Balances, a Statement of Cash Flows and then there are the Notes to the Financial Statements. Learn how to understand what these statements are telling you and how to strategically apply that information for your organization. Bring your lunch and join us in learning more about this important topic.

**Your facilitator is: Amanda Mellegers**

Amanda Mellegers recently joined PRHC as the Finance Manager. Amanda obtained her Bachelor of Business Administration degree at Trent University. She has earned her Chartered Accountant (CA) designation. She is the Treasurer for United Way of Peterborough and District and member of 100 Women Peterborough. Amanda has a wide range of public accounting experience which includes preparation of audits, reviews and compilation engagements for both for profit and not-for-profit organizations in various sectors.

## Chairing a Meeting

**Who Should Attend:**

Board members, Executive Director

**Date and Time:**

December 13  
12 noon – 1 p.m.

**Location:**

Lions Community Centre  
347 Burnham Street  
Peterborough, ON

**Cost:** \$15.00

We all attend a variety of meetings which when chaired and conducted well help your organization achieve its goals. Bring your lunch and learn some practical tips on how to chair a meeting from an experienced Board Chair. Increase your skills in setting the agenda, managing time and discussions effectively, and how to create a culture where all meeting participants contribute.

**Your facilitator is: Karen Wilson**

Karen Wilson has enjoyed a 25+ year career in the non-profit sector with the last 12 serving as Executive Director of Employment Planning & Counselling Peterborough. Currently the Board Chair of the United Way, she also sits on the Boards of the Peterborough Poverty Reduction Network and is Vice-Chair of ONESTEP, a Provincial umbrella organization for training and employment service providers. Her community contributions focus on capacity building, assisting organizations to collaboratively utilize their collective resources to serve citizens effectively.



### Board Roles & Responsibilities

**Who Should Attend:**

Board Members and Executive Directors

**Date and Time:**

Wednesday, January 16  
6-9pm

**Location:**

Lions Community Centre  
347 Burnham St, Peterborough

**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:** TBD

### Creating & Maintaining an Effective Board Team

**Who Should Attend:**

Board Members & Executive Directors

**Date and Time:**

Wednesday, January 30  
6-9pm

**Location:**

Lions Community Centre  
347 Burnham St, Peterborough

**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:** TBD

### Financial Oversight for Non-Profit Boards

**Who Should Attend:**

Board Members and Executive Directors

**Date and Time:**

Wednesday, February 27  
6-9pm

**Location:**

Lions Community Centre  
347 Burnham St, Peterborough

**Cost:** 30.00

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, and reporting systems

**Your Facilitator is:** TBD



## **Human Resource Stewardship for Non-Profit Boards**

**Who Should Attend:**

Board Members, Executive Directors, and Human Resources staff

**Dates/Times:**

Wednesday, March 27  
6-9pm

**Location:**

Lions Community Centre  
347 Burnham St,  
Peterborough

**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 Facilitator is:** TBD

## **Generative Thinking – Reframing Governance**

**Who Should Attend:**

Board Members and Executive Directors

**Date and Time:**

Wednesday, April 24  
6-9pm

**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 board's mindset during meetings
- Promote robust discussions
- How to avoid struggles during transition

**Your Facilitator is:** TBD

### Accessibility and Inclusion in the Workplace

**Who Should Attend:**

All interested staff, trainers and volunteers

**Date and Time:**

January 17, 2019

**Location:**

Lions Community Centre  
347 Burnham Street  
Peterborough, ON

**Cost:** \$15.00

**Accessibility and Inclusion in the Workplace**

The Peterborough Council For Persons with Disabilities will be leading this Lunch and Learn covering many aspects of operating a non-profit and serving a person with a disability. The session will include day to day operations in a workplace accessibility and accommodation for clients/customers and employees, and planning inclusive events, accessible communications and the language we use. Bring your lunch and hear from people with lived experience in a world full of barriers.

**Your Facilitator is: Jason King**

Jason King and his Dog Guide Zaun are well known in town.. As Outreach Coordinator for the Council for Person's with Disabilities (CPD), Jason organizes training for CPD Volunteers and presents the Time In My Shoes (TIMS) program to local elementary schools, and in the community.

### Effective Minute Taking

**Who Should Attend:**

Board members, Executive Directors, Staff

**Date and Time:**

April 3, 2019

**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**

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

## Special Interest Workshops

### Board Boot Camp

**Who Should Attend:**  
Executive Directors and  
Board Members

**Date and Time:**  
Friday, April 26  
9 a.m. - 4 p.m.

**Location:**  
Lions Community Centre  
347 Burnham St  
Peterborough

**Cost:** \$50.00

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, Philanthropic Impact for United Way Peterborough & District. She holds a Bachelor of Business Administration and a Certificate of Human Resource Management. Lisa has over 13 years of experience working in the non-profit sector in areas such as program management, board governance, and organizational development.

### Labour Community Advocate – Level 1

**Who Should Attend:**  
Union members

**Dates and Time:**  
January 10 & 24  
February 7 & 21  
March 7 & 21  
April 4 & 18  
All classes are on a  
Thursday evening and run  
from 6-9 pm

**Location:**  
Labour Council Office  
246 Romaine Street  
Peterborough

**Cost:** \$100

Labour Community Advocates are union members who take this 8-week course about their community and its resources.

Union members will learn:

- How to connect their union and its members with community resources and organizations
- How to share their knowledge with other union members who are looking for appropriate resources
- About listening, communication and referral skills
- About a variety of social issues affecting our community.

Labour Community Advocates work on behalf of the union to strengthen its ties and build stronger networks in the community, with the goal of achieving positive social change.

**Your Faciliator is: Stephanie Levesque**

Stephanie is the Labour Programs & Services Development Officer and over the years has been a member of ITU, COPE, OPSEU and CEP, now Unifor. She has 20 years experience facilitating ranging from two hour courses to week-long courses. She has certification from the CLC to facilitate.

### Registration Information

Space is limited, register early to avoid disappointment. Follow the links embedded in this document to use our online registration system. Or, go to Snapd Peterborough. If you have difficulty registering online, please contact the United Way at (705) 742-8839, ext 32.

### 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.

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