



Resource Development

Time Frame, two days

Community-Based Marketing

Time Frame, one day

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**Group Size, 25**

**Audience,** Board members, organizational leaders, directors, supervisors, and program coordinators

**Format,** highly interactive and experiential seminar designed to teach participants about tools, types and techniques in marketing and resource development; examine the validity and usefulness of their organization’s tools and plan for the design of successful strategies.

**Client pre-requisites,** teleconference or meeting to assess goals; submission, and review, of organization’s current tools and strategies

**RESOURCE DEVELOPMENT**

Resource development and management is critical to the health and success of non-profit organizations. Too often organizations put all of their eggs in one basket or fail to develop adequate plans leading to the success of fundraising initiatives. The following is a list of skill sets that will be focused upon during the program:

- Assessing your financial status, goals and avenues for giving
- Diversifying your sources and reviewing all of the sources for potential funding involving the right people for current and future activities
- Assessing your sustainability and expansion plans for staffing, programs, facilities and endowments
- Determining the best fund development initiatives to meet your goals based on current and potential capacity
- Developing a campaign strategy and understanding why and how people give
- Understanding the basics for producing a successful fundraising event:
  - Creating and running a special event
  - Getting the most out of your event
  - Planning and organizing your event
  - Producing the Event
  - Evaluating the success of your event
- Developing an individual donor campaign
- Grant writing basics and what grant review teams look for in proposals
- Understanding how to solicit services and in-kind donations
- Promoting continuous giving using cross-marketing opportunities
- Learning techniques and tools that sustain long-term continuous giving
- Learning how to use staff, volunteers and some clients to expand your outreach efforts

**COMMUNITY-BASED MARKETING**

Too often NPO’s use tools and strategies that are proven not to work. It’s time that NPO’s learn to develop tools that business sectors have used, which have been research, tested and proven to produce results. The following is a list of skill sets that will be focused upon during this program:

- Evaluating your tools, strategies and initiatives
- Assessing which tools and strategies are actually reaching and resonating with the target audience
- Understanding target marketing and general marketing
- Understanding and applying the 6x6 marketing strategy
- Branding your program and organization
- Positioning your organization and its products and services
- Conducting an internal marketing audit
- Developing a marketing plan and setting marketing goals
- Developing a promotion campaign
- Messaging strategies: assessing what works and what doesn’t
- Connecting to your audience: images and words that resonate
- Targeting primary and secondary audiences
- Tools that work and don’t work
- Capitalizing on events and strategies for outreach; cross marketing
- Measuring impact
- Adjusting formats, frequency, and functional quality of tools and initiatives
- Assessing problems and roadblocks, and coming up with solutions



### **Volunteer Development**

Time Frame, one day

### **Board Development**

Time Frame, one day

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Group Size, 25

Audience, Board members, organizational leaders, directors, supervisors, and program coordinators

Format, highly interactive and experiential seminar designed to teach participants about tools, types and techniques in marketing and resource development; examine the validity and usefulness of their organization's tools and plan for the design of successful strategies.

Client pre-requisites, teleconference or meeting to assess goals; copies of tools used in volunteer and board recruitment, training and monitoring

VOLUNTEER DEVELOPMENT

Volunteer management is a key competency for the development and growth of any NPO. The following are skill sets that will be focused upon during this program:

- Learn how to conduct an organizational volunteer readiness assessment
- Design effective internal and external marketing and recruitment tools and strategies
- Create volunteer menus & appropriate volunteer job/service descriptions
- Develop effective and program-appropriate screening, risk management and interviewing tools and strategies
- Learn how to develop ongoing training and support initiatives
- Learn how to effectively evaluate volunteers, coordinators/leaders and programs and engage in record-keeping and database maintenance
- Develop virtual volunteer opportunities for business and senior volunteers
- Understand and design volunteer structures that support strategic planning and program development goals
- Earmark resources for volunteer development and program support
- Learn how to respect the boundaries of a volunteer's time commitment and structure multi-level opportunities for one-time, short-term and long-term commitments
- Provide appropriate recognition and rewards
- Create and maintain a hospitable environment and empowerment-based culture within the organization
- Train staff members to respect the professional nature of a volunteer's commitment
- Learn what, and how to collect, volunteer data and how it can be used in marketing, fund development and program enhancement
- Create policies and procedures that educate, evaluate and enrich volunteers and all aspects of the volunteer program
- Learn how to weave volunteer recruitment messages into all fundraising, marketing, and messaging campaigns

BOARD DEVELOPMENT

Board members have fiduciary responsibility for the health and welfare of an organization. Their jobs should entail fiscal and legal oversight, selection of organizational leaders, fundraising, networking, and public relations. This program will provide participants with the requisite skills and knowledge necessary for board growth and development:

- Learn about the legal, fiduciary and program responsibilities of board members
- Develop board member job descriptions and identify appropriate roles and time commitments for board members
- Learn how to strategically assess the access and abilities that the NPO board needs to achieve the organization's goals and how to identify persons in the community who can help the organization succeed in its mission
- Learn how to conduct board prospect outreach, recruitment, interviewing and selection
- Develop a board member orientation and training program
- Learn how to create, manage and monitor board teams



Team Building

Time Frame, one day

Creative Thinking

Time Frame, ½ day

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**Group Size**, 20-30

**Audience**, open to all

**Format**, highly interactive & experiential utilizing group activities, and small group dialogues to build trust and cohesion, develop vision, plans and processes for decision making, problem solving and communication, and create an esprit d'corps

**Client pre-requisites**, tele-conference or face-to-face meeting with team leaders to ensure alignment of planned activities and the developmental goals of the organization; copy of mission, vision, values and goals; narrative of any challenges that exist or are on horizon; sample problems faced by participants

## **TEAM BUILDING & GROUP WORK**

This interactive, facilitated experience allows participants to engage in fun, interactive and experiential activities related to various skills and behaviors necessary to maximize team performance. The group develops best practices associated with each of the skill sets. The following is a list of skill sets that may be focused upon during the program. Organizations may choose the ones that best suit their needs and create a training program uniquely supporting the goals of their organization:

- Engage in Personality Profiling activities that help them understand characteristic and work style impacts on team performance. Profiling tools and activities include: Myers-Briggs, Enneagram, and the 4-Gets.
- Learn effective communication dynamics, patterns, and strategies; and address problems that arise in communication processes.
- Understand the stages of group formation and what leaders must do at each stage in order to facilitate growth and cohesion
- Determine group decision-making and problem solving processes.
- Delineate the vision, values, goals and strategies for the community and its teams
- Discern the challenges, individual-group-organizational-leadership, that hinder community and team spirit, growth and performance.
- Know how to build trust and build relationships so that conflict is diminished and loyalty to the team is insured.
- Experience conflict resolution practices that ensure safe environments for positive results.
- Identify effective practices for team leadership, coaching and supervision.
- Know what types of rewards and recognition activities accentuate team performance and how to maintain morale and motivation.
- Learn how to help a team adapting to changing conditions, requirements and environments.

## **CREATIVE THINKING & PROBLEM SOLVING**

Many of us must re-learn how we think about situations and their inherent possibilities so that we can tap into the creativity that is yearning to express within us. We must unlearn old ways of thinking and shift our paradigms so that they are aligned with the creative nature within us and open up the unlimited potential of the mind. This program enables each participant to:

- Distinguish between and be able to move between right and left brain thinking
- Separate perceptions from reality
- Learn and apply directed attention thinking tools to dilemmas faced daily within organizations
- Learn new models that can help in problem solving; models include:
  - Systems Model
  - A.M.E.N. Model
- Address and develop multi-tiered solutions to systemic challenges within their organizations, teams or employee/volunteer groups



## Leadership

**Time Frame**, one day

## Strategic Planning

**Time Frame**, one day

**Group Size**, 20-30

### Audience,

organizational leaders,  
project/program  
leaders, senior staff,  
board members,  
supervisors

**Format**, interactive &  
experiential utilizing

vision planning group  
activities, small group  
dialogues, and didactic  
lessons designed to  
guide the participants in  
their discernment,  
decision making and  
problem solving  
processes;

development of 1-5  
year plans

### Client pre-requisites,

teleconference or  
meeting to assess  
challenges, state of  
organization and  
leadership team; copy  
of bylaws,  
organizational chart,  
mission/vision and  
values; goals for  
development; copies of  
mission-vision-values  
statements; copies of  
organizational chart;  
copies of past plans

## LEADERSHIP

This interactive, facilitated experience allows participants to engage in thought provoking activities and dialogues, designed to enable each person to become a spirit-centered, servant, situational and strategic leader. Using our Leadership Star and B.A.S.K. models, participants learn how to assess their own attitudes, skills and behaviors, while effectively leading growth and change initiatives within a non-profit organization. The one-day program includes:

- Develop insight into personality and work styles, and their impact on role and task assignments
- Learn about leadership styles and their appropriateness pertaining to task assignments, delegation of responsibilities and creating climates of success
- Develop unified vision, purpose, passion statements
- Learn fundamental skills for developing people, creating empowerment zones at work, and dealing effectively with politics
- Learn how to enhance the performance and productivity of your staff
- Learn the fundamentals for leading, growing, inspiring & managing others
- Learn how to assess and mediate challenges that hinder effective group work and relationships. Challenges may include personal, inter-personal or organizational
- Develop a comprehensive collaborative vision for the leadership team and the organization
- Learn how to lead the organization or employee groups in the midst of change

## STRATEGIC PLANNING

Strategic planning can be as dry as dust that is shaken from the feet of those who are unwilling to follow, but not these sessions. These interactive sessions are actually fun for participants. Using our Planning Tree model and a team-based approach the facilitator, experienced in working with all types of groups at all stages of development, helps the group proceed through vision, retrospective analysis and even contentious situations, enabling them to develop a plan that is exciting and based on the investment of all. The following are aspects of planning that will be focused on during each session:

- Identification of roles & responsibilities in the planning process for leaders and facilitators
- Engagement in a historical/retrospective analysis of trends, changes and challenges
- Discernment of vision, values, mission and guiding principles
- Use of outcome-based program development tools
- Development of long-term, short-term and right-now goals and objectives
- Program and team development, planning and evaluation
- Development of client and community development initiatives
- Development of resource and fund development initiatives
- Development of internal and external marketing and communications initiatives
- Engagement in a SWOT analysis
- Involvement in organizational problem solving
- Awareness of planning roll-out and process pitfalls as well as strategies to avoid the pitfalls



## **Change Management**

**Time Frame**, one day

## **Conflict Management**

**Time Frame**, one day

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Group Size, 20-30

Audience, open to all

Format, interactive & experiential utilizing large group activities, small group dialogues, and didactic lessons designed to guide the participants in their assessment of self and issues relevant to their ability to adapt, change and perceive correctly; assessment of organizational policies and practices that lead to conflict and resistance to change; and determination of appropriate behaviors, attitudes, skills and knowledge necessary to mediate conflict and promote change.

Client pre-requisites, teleconference or meeting to assess current changes and conflicts

CHANGE MANAGEMENT

Change is inevitable. What we think about change, and how we handle it, will determine whether we, and our programs grow from it or resist it. This program enables participants to:

- Understand why over 70% of change management processes succeed partially but fail in key areas, and what leaders can do to ensure success
- Understand the nature and process of change
- Learn about the single most influential paradigm shift that promotes adaptability and flexibility within people and an organization
- Assess appropriate leadership roles, responsibilities and behaviors that lead to easy transitions in personnel and programming
- Understand how and why people react differently even to proposed positive changes
- Learn how to encourage individuals to take responsibility and initiative for changes relevant to their own programs and professional growth
- Learn why people resist change, how to help people overcome resistance
- Understand the emotional roller coaster effect that occurs within people when they are asked to embrace substantive change
- Learn how to promote, monitor and evaluate change processes
- Learn how to support others when they are engaged in a change process
- Learn what it takes to change the culture and climate within an organization

CONFLICT MANAGEMENT

Conflict is a creative process. It does not have to be tumultuous or time consuming. When conflict occurs it is a behavioral indicator that confusion exists, fear abounds, there is an imbalance in power, egos are frayed, or interactions are based on misperceptions. The one-day training program helps all participants:

- Develop an understanding of how and why conflict occurs within individuals, groups, and organizations
- Understand conflict management styles and how each can help or hinder problem resolution processes
- Understand how organizations can use our OCD model to reduce and prevent conflict
- Discern the underlying causes for conflict on teams
- Assess organizational policies, practices and procedures that may promote conflict and confusion
- Assess leadership decisions, behaviors, statement and styles, that, though well-intentioned, can unexpectedly produce conflict
- Identify the deceptive, passive-aggressive or manipulative behaviors and actions by individuals that can promote conflict
- Determine protocols and institutional practices that promote harmony and community at work
- Create mediation processes that can be used to resolve conflicts
- Learn about organizational programs that focus on creating and maintaining peaceful environments at work



Supervision & Coaching

Time Frame, two days

Time, Task & Stress Management

Time Frame, one day

Group Size, 20-30

Audience, open to all

Format, interactive, experiential using peer sharing and peer education activities to develop best practices, create a support system and promote continuous involvement in the learning process; use of small group activities to generate tools that can be transferred back to the working environment

Client pre-requisites, provision of sample job descriptions listing roles and responsibilities of participants; survey of 'top 10' challenges that participants are facing related to management of others; discussion about common stressors and any upcoming major changes at work

SUPERVISION & COACHING

As managers and program coordinators it is necessary for us to learn key skills, behaviors, attitudes and knowledge for guiding and growing other people. Using our B.A.S.K. and A.M.E.N. models we will help supervisors and leaders assess the effective practices relevant to being an exceptional manager. The following will be focal points in this training program, enabling all managing personnel to develop exceptional skills.

- Identify appropriate roles and responsibilities for managers and supervisors
- Learn how and why micro-management exists and what you can do about it
- Understand personality and work styles and how to bring the best out in others
- Understand how to set great expectations and learn how to help people adhere to and achieve those expectations
- Develop a on-the-job training and cross-training program to ensure peer support and program sustainability
- Learn how to coach others and help them set manageable goals
- Identify key behaviors and statements that get others to take the initiative for their own and the program's growth and development
- Learn how to give and receive performance feedback
- Create a growth-oriented performance feedback process
- Create a format for growth planning for your people
- Learn how to address problematic issues and behaviors in healthy ways
- Learn appropriate disciplinary interventions and processes
- Provide appropriate and meaningful recognition and rewards the promote performance and maintain high morale
- Learn how to create a learning and a being environment in addition to a doing environment
- Learn how to empower others
- Develop a succession plan to ensure the continuous cultivation of leadership

TIME, TASK & STRESS MANAGEMENT

The fact is that we have more to do than can be done in the time frames that we have available at work. This program provides participants with essential knowledge, skills and techniques that they can use to reduce stress, combat burnout and manage time:

- Learn new tools that help you organize time based on priority issues, important items and maintenance tasks
- Learn strategies you can use to switch your personal operating mode from crisis control to practical and proactive management
- Learn why stress occurs and how it is individually based and sometimes organizationally driven
- Learn what managers and leaders can do to ameliorate the physical, mental and emotional stress of their people
- Assess the internal and external balance of people
- Discern the belief and behavioral paradigms of individuals that determine how they will react to stress and pressure
- Differentiate between burnout and compassion fatigue and learn how to prevent both
- Learn why set-backs occur and how to handle them, creating positive outcomes
- Learn how to manage boundaries and say "no" while being of service to others



Preventing & Dealing with Harassment at Work

Time Frame, ½ day

Effective Communication

Time Frame, one day

Group Size, 20-30

Audience, open to all

Format, interactive, experiential using peer sharing and peer education activities to assess individual, leadership and organizational cultural factors that produce positive and negative interactions

Client pre-requisites, teleconference or meeting to assess incidences of harassment or maladaptive communication processes; copies of organizational policy manual; copies of job descriptions; survey of a sample group of employees and managers to assess daily challenges and concerns

PREVENTING HARASSMENT AT WORK

Harassment in any form can tear at and destroy the fabric of trust, teams and climate within an organization. Not only is it illegal, it is unethical and counter-productive to maintaining motivation and morale. This program provides participants – managers and employees alike – with the information they need to effectively identify, assess and deal with harassing behaviors. Using our red light/green light game, case scenarios, role plays, small group work and didactic presentations, participants will:

- Learn the legal conditions that constitute harassment-type behaviors
- Be able to identify behaviors, practices and actions that constitute sexual harassment
- Learn the definitions of violence, bullying, and discrimination, and how these definitions are used to evaluate harassment of any kind at work
- Learn about the policies and reporting processes that are designed to prevent harassment and are used to address complaints
- Learn about employer liability
- Learn to assess factors contributing harassment at work
- Identify preventative steps and intervention practices to limit behaviors before they become harassing
- Learn what targets of harassment can do; what their legal rights are; and who they should contact

EFFECTIVE COMMUNICATION

This interactive, facilitated experience allows participants to share and develop best practices related to 10 essential skills that form the foundation for effectively enhancing communication processes that encourage a greater sharing of ideas and information.

During this workshop, participants will:

- Evaluates the challenges inherent in multi-level communication and assess personal social styles of communication and their impact on others.
- Learn about learning and listening styles that help and hinder understanding
- Assess information delivery styles and content to ensure that all stakeholders hear and understand what is actually being communicated on factual, emotional and practical levels
- Identify managerial/leadership performance feedback areas that employees should contribute to; and develop a template and a process, for a performance feedback tool that employees can use to provide meaningful feedback to their managers
- Learn one directed attention thinking tool for managers (Opportunity Thinking) and apply it to problem solving during disagreements and the soliciting diverse opinions.
- Understand how disagreements and having diverse opinions can help a work unit/team grow; and understand why and how to safely manage opposing points of view from employees and colleagues in order to generate the best results for an individual, the team and the company.
- Identify and assess the interpersonal skills necessary to be modeled by managers and practiced by employees in order to create a culture of open, honest, growth-centered communication
- Identify on-the-job relationship building blocks that sustain open communication processes/networks
- Assess and answer key questions that will allow managers to redesign their own organizational structure and system of communication
- Practice skills for delivery of information and feedback in a constructive and objective manner that may otherwise be construed as negative.