



Center for Nonprofit Leadership

Engage. Learn. Transform.

Workshop Descriptions by Category 2012

Board Leadership and Governance

Board Leadership Roundtable BL1

Join us for the Quarterly Board Leadership Roundtable! This county-wide event is a unique opportunity for both new and seasoned Board members to convene for the purposes of networking, information sharing and addressing mutual successes and challenges unique to their leadership roles.

Board Leadership 101 BL2

Do you serve on a nonprofit Board of Directors but have questions about what you signed up for? What are your roles and responsibilities? And what about the fundraising expectations no one ever mentioned? If you answered yes to even one of these questions, this workshop is for you!

Facilitated by experts with years of nonprofit Board service, this workshop will provide an overview of the basics of board service including roles and responsibilities, different types of nonprofit boards, legal and fiduciary responsibilities, board/staff roles, and board structures. This workshop is designed for those new to nonprofit board service or those who just want a refresher course. Come yourself, or send a new Board member!

Build-a-Board for the Emerging Nonprofit BL17

What is the right size board for my organization? How do I identify good board members? How do I recruit good board members? Answers to these questions and more will be provided during this two-part series for smaller nonprofits on building their best board.

Session I will provide hands on, organization specific consulting to identify and recruit board members based on factors such as diversity, the strategic plan, and clients served by the organization. Session II will look at board responsibilities, transitioning from a working to a governing board, and retaining quality board members. Take your board and organization to the next level!

Meetings, Minutes & More BL3

Learn how to conduct a board meeting effectively at this seminar. Board members and officers, chair persons, corporate secretaries, and anyone else with an interest in effective and legal board operations should attend this seminar. Workshop topics will include how to improve attendance, why Robert's Rules can harm your organization, what never to put in the minutes and more. Leave with tips on how to manage efficient board meetings.

Nonprofit Bylaws: A Framework for Effective Governance BL18

Since many nonprofit corporations were formed, the state legislature has revised laws governing bylaw requirements several times. Bylaws conflicting with the nonprofit code are superseded by state laws; bylaws which do not have certain provisions are also controlled by the code.

If your bylaws have not been reviewed by an attorney within the last three years, this seminar is for you. Topics include: officer and board member responsibilities, the scope of committees, differences between membership and non-membership nonprofit organizations and voting rights. Bring your bylaws and Articles of Incorporation; time permitting, the instructor will review them.

Building Financial Literacy: A Board's Imperative BL7

It is a given that a principal responsibility of a nonprofit board is to oversee finances. How many board members understand the underlying economic structure of their organization and what precisely do they need to know in order to ensure that sufficient resources of the right kind are found to deliver its mission?

Are you prepared for this important board responsibility? Do the financial documents reflect an accurate picture? Do the numbers add up? If you don't know what to look for when you receive your nonprofit's financial report, and yet you know it's ultimately the board's responsibility, this workshop is for you.

Attend and focus on reading and using financial reports to assess the financial condition of your organization. We'll discuss how to analyze a set of financial statements and monitor organizational performance. Participants may bring their own financial statements for use during the analysis portion of the workshop. Please bring a calculator.

Using Financial Statements to Assess & Monitor Performance: a Board Member's Primer BL8

It is critical that board members not only understand the organization's financial statements but also ensure that adequate resources are available and effectively managed. Are you prepared for this important board responsibility? Do the financial documents reflect an accurate picture? Do the numbers add up? If you don't know what to look for when you receive your nonprofit's financial reports, and yet you know it's ultimately the board's responsibility, this workshop is for you.

This workshop doesn't deal with how to calculate the numbers; instead it gives you practical guidance on the key areas of the financial reports that tell the most. Attend this workshop and focus on reading and using financial reports to assess the financial condition of your organization. We'll discuss how to analyze a set of financial statements and monitor organizational performance. Participants may bring a recent audit or set of financial statements for use during the analysis portion of the workshop. Please bring a calculator.

Building Board Diversity & Inclusion BL12

Diversity and inclusion are key components to a successful board. As demographics continue to shift, nonprofit and community boards must reflect and represent the needs and perspectives of the communities we serve. A diverse board enhances an organization's ability to work with and be accountable to its constituency. It unlocks new perspectives and solutions to the issues our organizations address. It opens possibilities for new funding streams. It ensures the best possible organizational practices. But meaningful diversity is not possible without an inclusive board culture.

Beyond Names and Numbers: Building a Diverse AND Inclusive Board is an 8-hour training for Executive Directors and Board Members focused on achieving a Board that is comprised of a diverse group of people AND fully values and includes those people in every aspect of Board work and organizational life. Training Topics Include:

- Is Your Board Ready for Diversity?

- Benefits of Diversity/Inclusion
- What Undermines Diversity/Inclusion Initiatives?
- Creating a Culture of Inclusion
- Maintaining a Successful Diversity Initiative
- Recruiting and RETAINING a Diverse Board

Educating the Board about Planned Giving BL4

What role does the Board play in a nonprofit's planned giving program? Does it take the lead or serve as a supporting player? How can the board be educated and engaged in planned giving and what responsibilities should it have in helping build the endowment? This workshop, offered for both development staff and Board members, will offer helpful suggestions in how to train and involve your board specifically in your planned giving and endowment program.

Mobilize Your Board to Raise More Money BL5

If your board isn't raising all the money it could -- indeed, if your board isn't raising any money at all -- you're not alone. In this workshop, we'll discuss the reasons why, and outline strategies to turn things around. You'll leave with several practical, specific ideas for increasing board involvement and effectiveness, including:

- Creating and using board "job descriptions" to recruit willing fundraisers
- Lots of options: 20 ways your board members can bring in the bucks
- Using the board to identify and solicit big gifts
- Training and motivating your board

goBeyondhello: How to Make Fundraising More Comfortable for Your Board BL10

Experience a unique fundraising program from Marshall Howard, the nationally acclaimed trainer and author of "Let's Have Lunch Together." The goBeyondhello Board Outreach Series shows you how to build the trust naturally that motivates your board to fundraise comfortably. Tap into their resources from media connections, business and personal relationships, grantmakers, government contacts, in-kind opportunities, to corporate sponsorships, and so much more!

This fun, interactive program shows board and key leadership staff how to work in teams. You'll learn how to uncover all those golden nuggets buried within your board and supporters. You'll learn a step-by-step roadmap based on Marshall Howard's bestseller "Let's Have Lunch Together." Marshall's unique, 25 year proven system will help you to spot new opportunities continually when working with your board.

How to Transform your Board into Powerful Partners BL13

Can a powerful relationship strategy really build capacity and move a board to the next level? Attend this workshop and learn step-by-step, exactly how it can. Packed with lots of real-world relationship building techniques and best practices, this interactive workshop is designed for organizations that need the strong partnership of a powerful board to help them achieve their goals. Through the power of relationships, participants will be able to uncover new board resources and relationships, secure quality referrals and introductions to the right people, build deeper commitments, and motivate board members to new levels of achievement. All participants will receive workshop materials, plus a free copy of *Let's Have Lunch Together*.

Boards and Fundraising: Converting Reluctance to Confidence and Success BL19

Join us at this NEW! Workshop and learn how to maximize your board's involvement in your organization's fundraising. The session will focus on organizational fundraising strategy, board recruitment, the "hows" of fundraising and increasing the skill and comfort levels of the board to engage in fundraising. The session will provide practical approaches to eliminating or reducing any reluctance or fear, providing varied approach to involving board members, and inspiring the board through fun and confidence building so that they become capable of successful fundraising activity.

The New Form 990: What Every Board Member and CEO Needs to Know BL11

The new Form 990 is substantially different and more voluminous than the existing Form 990. One of the areas where the new Form 990 requires far more information than its predecessor is in the area of the governance of the filing tax-exempt organization.

This presentation will focus on the governance "requirements" of the new Form 990 and will also address other facets of the new Form 990 (for example, insider compensation, information reporting, special events reporting, lobbying activities) which any tax-exempt organization Board of Directors member or Officer should be made aware.

Board Leadership Institute BL6

Are you new to nonprofit Board service? Do you serve on a nonprofit Board but have questions about what you signed up for? What your roles and responsibilities are? And what about the fundraising expectations no one ever mentioned? If you answered yes to even one of these questions, this certificate program is for you!

Generously underwritten by the Amgen Foundation and the Weingart Foundation, this certificate program will provide opportunities for in-depth discussions on key topics impacting Board members and Board service. Each module will be moderated by lead faculty, and facilitated by community experts with extensive experience in the nonprofit field. Topics will include:

- Board Service 101: Roles, Responsibilities, Recruitment and Engagement
- Board / CEO Partnership
- Strategic Planning
- Development and Fundraising
- Ethical, Legal and Financial Literacy
- Marketing and Communications
- Community Priorities and Ventura County Nonprofits

Attendees will receive FREE templates, tools and access to cutting edge resources geared to support effective board service, including popular BoardSource publications. Upon completion of the series, participants will receive a certificate from VCCF and California Lutheran University.

Strategic Planning Institute BL14

Organizations do not realize their full potential for two primary reasons. First, leaders fail to develop and articulate a shared vision for the organization's future. Second, individuals within the organization are unclear of their role in advancing the organization's mission. Strategic planning addresses these concerns by cultivating a shared vision, defining milestones and benchmarks, and clarifying roles and responsibilities.

The leaders of small nonprofit organizations (with annual budgets of less than \$500,000) often find themselves faced with the challenge of planning "on the run" with few or no resources set aside for the

effort. Yet executive directors and board members of these grassroots groups have the same responsibility for planning as their counterparts at larger, more established agencies.

In partnership with Pepperdine University, the Strategic Planning Institute provides an opportunity for a small group of these grassroots nonprofit organizations to receive professional planning assistance through VCCF's Center for Nonprofit Leadership. The program begins in the spring each year and results in the development of a strategic plan to guide each of the participating agencies for the next three years.

The Institute will leave participants with more than a three-year plan. The process is designed to result in stronger relationships with internal and community stakeholders, greater capacity for planning and momentum for implementing planned change. Participants in the Institute will develop a plan in three phases: 1) defining the current situation; 2) envisioning the future and selecting appropriate strategies; and 3) implementing measured steps to move the organization toward a shared vision.

Participating agencies will be required to send a minimum of two representatives (this planning "team," should include at least one staff member and one board member) to a series of three evening workshops on strategic planning. The workshops will provide information and resources, assist participants in building planning skills and guide agency leaders in selecting and implementing planning activities.

Leadership 2.0: Critical Issues in Shared Leadership: The ED/Board Chair Connection **BL15**

This sessions goes beyond the basics of effective board management and focuses on the relationship between a board chair and an executive director and why that is a crucial nexus. During the session, research and best practices will be presented on understanding the distinctive but complementary roles and responsibilities of these two leaders, mutual accountability, communication, and how these processes help the board chair to mobilize the full board to be effective and similarly the executive director to lead the staff.

Through discussion and case studies, participants will be engaged in each topic -- sharing what has worked well in their organizations and hearing options for how to address challenges they have encountered. The workshop will blend conceptual frameworks with practical problem solving and understanding the nuances of specific situations such as start-up organizations, the presence of founders, etc.

Leadership 2.0: Transparency & Financial Responsibility of the Nonprofit Board **BL16**

The nonprofit sector, and the boards who guide them, are confronting challenges beyond the perfect storm: dramatic drops in operating support, staff layoffs, furloughs and pay cuts, donors retrenching and sometimes questions of survival itself. The impact on staff, productivity and your impact in the community is tangible – while at the same time your organization is faced with burgeoning client needs. Are these the 'new normals', and will 2011 represent a return to the prior era, or a new baseline? What is your responsibility as a board member in providing leadership through these challenging times? How best can your board adapt to these new realities?

The goal of this session is to help sharpen and refine your board's fiduciary responsibilities during this era of transformative change, with a focus on financial oversight and financial literacy. In this seminar for board members and executive directors, we will look at the critical elements of financial accountability from three perspectives: financial accountability to the general public, to the board of directors and leadership, and from staff and management. Participants will leave with checklists to help improve board members' financial accountability.

Leadership 2.0 The Challenge of Change: Rethinking Board Governance BL20

Nonprofit boards are undergoing massive change! The search to attract and retain high-performing leaders continues to intensify in a very competitive landscape. A highly charged board is the engine to your organization's success. Join this session, designed for CEOs and Board Chairs, who want to take a candid and serious look at board governance practices and explore a new set of paradigms.

This interactive session will allow participants to step back from routine governance practices and:

- Learn ways to build the strategic board with leaders who are engaged and excited about their board work.
- Gain awareness of cutting-edge and developing board governance trends.
- Think seriously about alternative approaches to board meetings, committees, identification and recruitment of new board members, measuring success and board assessments.
- Understand and break through barriers that prevent you and the board from seeing and implementing new ideas that will help your board change and become more effective.
- Explore: How do you get boards to "think outside of the box?"
- Embrace change as a force for board renewal.

Board Financial Oversight BL9

We are in the midst of historic transformations in the nonprofit sector serving our region, made more precarious by the extreme volatility in financial markets, the response by donors and disruptions in our state funding. The nonprofit sector, and the boards who guide them, are confronting challenges beyond the perfect storm: dramatic drops in operating support, staff layoffs, furloughs and pay cuts, donors retrenching and sometimes questions of survival itself. The impact on staff, productivity and your impact in the community is tangible – while at the same time your organization is faced with burgeoning client needs. Are these the 'new normals', and will 2010 represent a return to the prior era, or a new baseline? What is your responsibility as a board member in providing leadership through these challenging times? How best can your board adapt to these new realities?

The goal of this session is to help sharpen and refine your board's fiduciary responsibilities during this era of transformative change, with a focus on financial oversight and financial literacy; tracking operating performance; understanding reserves, investments and the role of endowment; changes in your donor and funder base and the impact on generating revenue; and the importance of financial equilibrium.

This special session is led by Hugh Ralston, President & CEO of the Ventura County Community Foundation along with colleagues from the investment, banking and financial communities. The dialog and conversation is both strategic and practical, with each participant to come away with tools and approaches that can be applied right away.

Nonprofit Leadership

Nonprofit Leadership Council NPL1

Join a group of your peers at the next convening of the Ventura County Nonprofit Leadership Council. The Council was conceived by a group of local leaders as a forum for both seasoned and emerging nonprofit executives in Ventura County. Its purpose is to provide opportunities for learning, networking with colleagues, and further development of leadership skills. Convened by VCCF Center for Nonprofit Leadership and facilitated by local nonprofit leaders.

Essential Tools for Executive Directors NPL2

A must for any new Executive Director or anyone re-entering the sector after time away, this course provides the framework for developing the skills necessary to succeed as an executive director. Topics include:

- Strategic planning
- Board development
- Fundraising
- Managing people
- Technical and financial systems
- Community outreach
- Program development and evaluation

Leadership Skills for Social Change NPL3

The Ventura County Community Foundation firmly believes that successful nonprofit organizations depend on committed and talented people in leadership positions and that strong leadership is key to a vibrant nonprofit community. Such leadership requires a wide range of qualities, including clarity of purpose, flexibility, stamina, and the ability to inspire other to do their best work. Perfect for both seasoned and emerging nonprofit leaders, this interactive session will focus on:

- Leadership styles: working with a diverse team
- How leadership needs change throughout the lives of organizations
- Leadership for the long haul: time management and self-care

Meeting the Leadership Challenge NPL4

Whether you are a “born leader” or are working hard to become an exceptional one, this workshop will help you to focus on what really matters. Building on the knowledge you already have, it will take your leadership practices to a new level. The workshop will include techniques for applying your natural strengths to leading as well as communication and motivational tools to help you to inspire others and get the best from your team.

Sidney Lyons Leadership Series NPL6

Made possible through his posthumous generosity, the Sidney Lyons Leadership Series will encompass capacity building and professional leadership development for organizations that serve the addiction recovery community, including recovering addicts and those struggling with addiction to alcohol and drugs. In this program, comprised of four interconnected learning modules, participants will explore the many facets of transformational change, management and leadership excellence, resource development and professional growth.

Who Should Attend? Leaders and emerging leaders from Ventura County nonprofit organizations, including:

- New Executive Directors
- Nonprofit Professionals interested in a future executive leadership position
- Emerging Leaders
- Corporate & Public Sector professionals seeking to enter the nonprofit field
- Professionals managing change in their organizations

Leadership & Transition

This module will focus on you leadership strengths, how you can develop them and put them into practice. Each participant will develop goals and action plans for their own leadership

development, as well as evaluate the leadership qualities of their direct reports, if applicable. Supervision issues will also be discussed, including effective delegation, positive feedback and maintaining boundaries.

Transformative Change

The working world of service providers is chaotic, complex and constantly changing. This module will address skills that are necessary for effective change management and help participants understand how they can best manage in this demanding environment. Change management issues that will be discussed include developing and actualizing a vision for change, and communicating and implementing change.

Relationship Building & Prosperity

Demystify relationship building and fundraising! This module will help participants understand how everyone in the organization is a fundraiser, how they can cultivate this art and skill in themselves and how they can develop it in others to create and meet development goals. Discussion will include the range of fundraising strategies, the relative effectiveness of each strategy, the role of relationships in fundraising, the roles of boards and staff.

Practicum

This module builds on the previous three sessions and is an opportunity for participants to pursue an area of interest in greater depth. A list of possible practicum topics will be developed by the trainers and be provided to each participant to stimulate ideas. Each participant will get a chance to present their practicum and get feedback from the group.

Inspiring & Rejuvenating the Nonprofit Professional NPL5

You've dedicated your professional life to taking care of others. In this interactive, inspiring, and fun workshop, it's all about taking care of you. Experience and learn techniques that will deepen your connection to your self, your staff, and your partners in the non-profit community.

- Reconnect to the original vision that brought you to pursue meaningful work.
- Enhance your communication and empathy skills.
- Manage the stress inherent in nonprofit work.
- Create and deepen relationships in your community partner network.

You'll apply what you learn the moment you return to your workplace. Better still, these tools are just as effective away from the office. If you seek greater satisfaction—and less stress—from your professional and personal life, take advantage of this opportunity to incorporate these rare but crucial management skills.

Nonprofit Management

Starting a Nonprofit Organization NPM1

Are you thinking about starting a nonprofit organization? Do you have questions about benefits and responsibilities of tax-exempt status? If you are ready to begin exploring resources for getting started, this seminar is for you.

This introductory seminar explores the advantages and disadvantages of becoming a nonprofit organization. Topics include defining the community need and fundraising potential for the organization, structural considerations, legal formalities and tax requirements. The steps necessary for incorporation and the tax-exemption process will be included. During the session, participants may present their ideas to the group for discussion.

Strategic Planning NPM2

Strategic planning is a powerful tool for management excellence and organizational growth and effectiveness. This intensive workshop will discuss the fundamentals of the strategic planning process, the reasons to plan, who to involve in the planning process, the various strategic planning tools and approaches, and how to make the best out of limited human and financial resources.

The workshop will be a comprehensive, interactive session and will provide specific steps to take to support your strategic planning efforts, how to manage expectations and how to use the outcomes to support Board and fund development. Participants will discuss how to set your organization up for success and how to design a planning process to meet your organization's unique needs. Target audience: Executive Directors and members of the Board of Directors. Staff members are also welcome.

Defining Vision and Values to Improve Organizational Effectiveness NPM4

Is your vision in alignment with your organization's vision and values? This workshop aims at assisting you to clarify and define your vision and values in order to improve the effectiveness in your work with nonprofits. Once defined, a clear vision can be a powerful tool in exercising strategies for change in your work.

Feasibility Studies / Needs Assessments NPM3

Before you crank out that proposal to the funder, come join us to learn how to really make your case. A well done "needs assessment" can assure you are aiming at the right target and it shows funders that you are working from more than mere observation. We will explore the basic elements of a strong needs assessment and then discuss creative ways for tailoring that assessment to suit a particular problem area.

Once you have your target need in sight, you must select the right strategies. Avoid wasting energy and scarce resources by conducting a "feasibility study". If your idea proves feasible you will have an edge on the competition by being able to demonstrate you've thought things through. Attend this workshop and explore how to conduct a useful needs assessment and feasibility study for any size project

Program Planning for Nonprofits NPM4

Do you have a great new idea for a program? Do you want to improve your existing efforts? Want to make sure you've thought it through? This workshop will guide participants through the program planning process, ensuring that your programs are in alignment with your organization's mission, strategic planning goals, and the needs of your constituents. Topics will include needs assessment, logic models, outcomes, goals, strategies, objectives, and effective evaluation plans.

Program Evaluation NPM5

Are supervisors, funders or key stakeholders requesting a program evaluation? Are you unsure about how evaluation can be applied to your nonprofit's services or activities? Are you interested in improving what you're doing and making more informed decisions about your work?

Program Evaluation is about using information to improve your programs. This workshop will include a lively discussion of techniques and strategies for answering critical questions about the true impact of your organization's programs. Discuss methods for collecting data, how to plan data collection and how to apply data to identify program changes. What is sometimes thought of as a boring topic comes to life in this important workshop!

Qualitative Evaluation Methods NPM6

How often have you found yourself faced with the quandary of finding data to demonstrate program success? In the face of the daily challenge of gathering and managing numbers and statistics, consider qualitative evaluation methods to capture information as it actually appears in real situations, or as it is actually expressed by your clients and stakeholders. Come learn more about various qualitative evaluation methods including key informant interviews, focus groups and participant observations.

Communication and Conflict Resolution NPM7

Okay, it's no surprise to say that we have been communicating since birth and should be good at it by now! Then why is it so difficult to be understood? Join us for an interactive discussion about various sources of conflict, your style of addressing conflict, and how to prevent and resolve conflicts.

By attending this exciting new workshop, participants will also learn about levels of communicating and identify barriers to effective communications and strategize solutions that work.

Project Management Basics NPM8

Project management is quickly becoming the method of management for more and more industries. Projects are being done for everything from building a new community center to reorganizing the filing system. During this workshop participants will learn essential project management "jargon" to converse intelligently with funders. They will also explore the project management "knowledge areas" and the "project life cycle" which are at the core of this valuable management method.

Time Management:

Effective Time Management Strategies for the Busy Nonprofit Professional NPM9

Time is a precious currency for every nonprofit professional, but no matter how hard you try, there are only 24 hours in each day. Learn how to beat the clock and take control of your work time, and your life. Be more effective, productive and less frazzled.

This workshop will focus on gaining greater control of the events that make up your work day. We'll explore setting goals and day-to-day priorities based on both values and long-term vision. We'll also look at developing effective and efficient systems for processing and managing information, and strategies to support co-workers in effectively using time at work.

How to Excel in Supervision NPM10

Being a supervisor presents challenges as well as opportunities for growth. No longer just “one of the team members,” it is sometimes difficult to be the person in charge. This seminar is designed for new supervisors as well as for those who have not had formal training in their role. Topics include how to manage other people’s performance, effectively communicating with your staff, building teamwork and cooperation and creating work environments that motivate people to achieve organizational goals and objectives.

High Performance Teams NPM11

What is all this talk about teams? Most large nonprofit organizations and government agencies are using teams to bridge the gap across organizational lines to improve communications, increase efficiency, develop products and services, and more. The characteristics that define high performance teams are clear; their effective implementation is the challenge.

Attend this workshop to clarify what a team is and the types of teams. Participate in activities that illustrate the value of teams and determine where they are most useful. Discuss what it takes to transition into a team-based organization.

Nonprofit Human Resources: Hiring, Firing & Everything in Between NPM25

So You Want To Be An *Effective* Supervisor? This seminar focuses on several aspects of successful supervision, including: 8 common mistakes by supervisors; do's and don'ts for applicant interviews; creating and implementing useful performance reviews; handling disability situations; the importance of documentation; layoff strategies; effective probationary or other disciplinary documents; a detailed termination checklist; and handling the termination meeting.

Key Conversations for Collaborative Success NPM15

We hear a lot of talk about collaboration these days. But in spite of our best intentions, there is a wide range of ideas about what “collaboration” means and how to achieve it. There is peril in getting sidetracked by competition or stuck along the road and settling for compromise or cooperation.

What are the key conversations that need to happen within groups and between groups in order to build authentic collaboration that works for all? Join us as we explore these topics and learn specific tools for helping groups achieve the promises and power of collaborative efforts.

Improve Organizational Performance through Mission/Income Alignment NPM23

Now more than ever, limited resources and rising demands are the norm for nonprofit organizations. For many it is challenging to improve performance. Is your organization searching for ways to achieve greater impact from your programs? Do you want to reduce expenses and increase income, but are not sure where to start? Do your staff and board members sometimes lose focus on your organization’s work? These tough times require strategic allocation of resources, and this workshop will help you do that through alignment of program income and organizational mission.

We will discuss ways to identify your true, all-inclusive operating cost data, and we will learn to apply that data using the mission/income matrix, an analytical tool that forward-thinking organizations can use to significantly improve their performance. It helps organizations focus resources on effective programs, and make intentional decisions about those that are important but need improvement. Such strategic actions can have a transformative effect on your organizational performance, morale and outlook.

This will be a refreshingly engaging 3-hour workshop about developing and using good data. It is especially recommended for executives and senior leaders of organizations with several lines of business, or department heads managing multiple programs, and particularly appropriate for non-financial specialists.

Workshop participants will:

- Understand the importance of aligning organizational finances with their mission;
- Learn the value of “economic clarity” for strategic decision-making;
- Practice using the matrix through simulation exercises.

Executive Transition and Succession Planning NPM16

A change in executive leadership is one of the most important, challenging and powerful opportunities a nonprofit organization will face. Whether you are an Executive Director thinking about retirement or a job change or a member of a board whose Executive has announced his/her intention to resign, this Power Lunch will address specific techniques and approaches for managing succession and transition in ways that enhance organizational capacity.

Human Resources and the Law NPM12

Concerned about conforming to human resource regulations? This seminar will serve as a great “check-up” on your compliance with civil rights laws, the Americans with Disabilities Act, new California labor laws and immigration regulations. This highly relevant seminar will cover issues from hiring to separation to help you avoid conflict and potentially costly litigation.

Build Your Own Personnel Handbook NPM18

Join us for a detailed “build-your-own-handbook” seminar in which you will receive a master handbook that can be modified to suit your needs. You will be able to plug in your organization’s specific need into this master, and receive page-by-page tips on the types of things you may want to include on these subjects in the handbook. This seminar is tailored for organizations with fewer than 50 employees.

Nonprofit Insurance 101: An Introduction to Insurance for Nonprofit Organizations NPM19

The nonprofit sector plays a vital and increasingly important role in the lives of residents throughout Ventura County. It is important to protect your nonprofit organization’s core assets. Before purchasing insurance, nonprofit leaders should take the time to learn more about their organization’s exposures, assess available resources, minimize the risk of loss, and understand the insurance marketplace. This workshop will assist nonprofit leaders to better understand the insurance risks they confront in achieving their mission and what specific insurance policies are available to nonprofit organizations.

Nonprofit Risk Management NPM13

Is your nonprofit properly insured? Will your insurance policy defend your volunteers if they are sued? This presentation will cover insurance basics for risks unique to non-profits, including general liability, special events, liquor liability, non-owned automobile, directors & officer’s liability, as well as lesser-known exposures, including employment practices and professional service errors and omissions. Loss prevention practices will be reviewed. In addition, there will be a guest presentation on employee benefit packages specially designed for nonprofit organizations.

Directors and Officers (D&O) Insurance NPM20

Directors and Officers (D&O) insurance policies cover claims arising from governance and management of nonprofit organizations. Every insurance company's D&O policy is different, providing different coverage, limitations and exclusions. If you are considering first-time purchase of D&O coverage or you want to make sure that your current policy provides the coverage you need, this session will address the nature of D&O exposures and the types of events that might lead to claims covered under a typical D&O policy

Building Better Bridges to Government NPM17

Strong relationships with local governmental agencies and elected officials are often important to the effectiveness and success of any nonprofit organizations. In some cases that relationship is cooperative and complementary and, in others, it is competitive. Whether based on funding, service delivery or a shared commitment to meeting the needs of the community, strong relationships between the nonprofit and public sector can be at the heart of identifying and responding to community needs, working collaboratively and advancing mutual goals.

Join us at this important community forum to discuss shared concerns and build partnerships to address pressing community needs. Panel participants will include local nonprofit leaders, elected officials and municipal government representatives.

Advocacy Skills for Nonprofits NPM21

Advocacy skills are critical to achieving the mission of your nonprofit organization. Come learn the role of nonprofits in conducting advocacy, what nonprofits can and shouldn't do and how you can integrate easy advocacy techniques into your organization's operations. This session will focus on practical and sustainable advocacy techniques with a particular focus on informing local and state policy decision makers.

Leadership 2.0: Sustainable Strategies for the Developed Nonprofit NPM22

Have you ever wondered what sustainability actually looks like? Is it money? Is it leadership? Is it our ability to adapt to a changing environment? Is it our ability to build our own capacity to meet the needs of who we serve? What does it take to achieve real sustainability and how will we know when we have gotten there?

Join us as we delve deeply into the factors that contribute to organizational sustainability, and how to assess and enhance them within nonprofit agencies with strategic investments and a culture of innovation and collaboration. In the workshop, you will learn how organizational sustainability is planned, developed and managed, and how stakeholders - the Board of Directors, staff, partners, and donors - need to be engaged to achieve the best long-term results.

Making Performance Reviews Work NPM14

Most annual or semi-annual evaluations do not change or improve employee performance. A recent book by a UCLA professor even suggests doing away with them altogether! And yet, if you are to increase productivity and strengthen your staff colleagues, you need as many tools as you can find to work for you. This seminar will equip you to convert a rather unproductive exercise into a comfortable, valuable and effective management tool for improving your employees' performance.

Managing Financial Resources Wisely

Budgeting Basics for Nonprofits FIN1

A well-crafted budget is now more important than ever. Using case studies, this workshop teaches you how to construct a basic budget, develop income and expense projections and produce meaningful budget reports. Topics will include allocation of administrative costs, estimating personnel and non-personnel expenses, presenting budgets to your board and cash flow projections.

Budgeting Basics for Proposals FIN2

Using case studies and real-life examples, this workshop provides the skills necessary to meet grantmaker requirements for budgets. Topics include: the difference between budgets and income/expense statements, common program and indirect costs, and budget justifications. This class is recommended for anyone who has ever struggled with a proposal budget or who has enrolled in Introduction to Proposal Writing.

Get Going with QuickBooks: Basics for the Non-Accountant FIN3

This course introduces QuickBooks functions and how easy and non-threatening the program can be to navigate. Paying bills, writing checks and developing a financial report in just a few steps: Who says we need an accountant to get a report?

Get Going with QuickBooks: Setup Decisions & Application Overview FIN9

This course will assist you in making setup decisions and help you identify the key information that you will need to successfully set-up QuickBooks.

Get Going with QuickBooks: Making the Decision FIN10

This course will assist management staff and board members to identify the need for using a computerized accounting system. Included is a brief overview of QuickBooks and how it can work for your organization.

Basics of Nonprofit Accounting FIN4

Nonprofit organizations confront new skepticism about their ability to manage funds and fulfill donor expectations. Join us for a new workshop designed for nonprofit executives and financial managers who aspire to have their nonprofit meet the highest standards for accountability.

This comprehensive survey course will focus on definitions; the various concepts and components involved in the development of financial information; and an overview of basic financial reports. The course will begin with an overview of what it means to be a nonprofit and to do functional accounting in that context, then move into specific areas that are often problematic to nonprofit finance managers. Topics will include general ledger and chart of accounts, policies associated with revenues and cash receipts and financial management and tax reporting.

Please feel free to bring copies of your current financial documents, Form 990 and Audit. Bring a calculator!!

In Search of the Perfect Financial Statement FIN6

How do we find the delicate balance between too much information and not enough? Fiscal staff may struggle with preparing reports that are at once comprehensive, yet user friendly. Do we even have a system set up so that we can generate the reports our stakeholders need?

Attend this hands-on workshop and learn how to effectively prepare reports that meet the needs of different audiences. We will start out with an overview of what your nonprofit financial system should be able to do and how to use it to generate the reports you need. Please bring a pencil, calculator and a copy of your financial documents.

Overcoming the Challenges of Government Contracts FIN5

Juggling multiple reporting formats, matching requirements, cost allocation and cash flow are but a few of the challenges facing nonprofits as they grow and expand into multi-funded agencies. While acquiring more government contracts usually results in more money it also means more complications and more ways to make mistakes.

Join in a morning of frank discussion about challenges and solutions that will turn a nightmare of competing requirements into a smooth flow of management information.

Building Investment Policy Culture FIN7

Recent swings in investment markets, and the impact on operating budgets of local nonprofits, raises the importance of oversight, good policy and strategy for using endowments wisely. This session will focus on the important building blocks for a successful investment policy for a nonprofit – asset allocation and risk targets, diversification, benchmark evaluation, expected returns, setting manager expectations and compensation.

Attendees will receive updates on best practices, current thinking in investment circles about approaches to long term investing and how best to communicate to stakeholders credibility on these important elements of a nonprofit's financial structure.

Financial Literacy Bootcamp FIN8

Perfect for nonprofit CEOs, finance staff, and Board Members, this two-part workshop is designed for those who aspire to have their nonprofit meet the highest standards of accountability.

Session I: Designed for board members and CEOs, this session focuses on an introduction to nonprofit accounting and financial concepts and important issues to consider. The agenda will include an overview of financial reports and what they are supposed to tell us. The session will end with analysis of sample financial statements.

Session II: Through small group discussion, peer review and feedback, Session II will focus on answering specific questions participants have about their own financial reports. Attention will be paid to accounting systems & transforming what you've got to what you need.

Leadership 2.0 Tools for Success: Linking Money to Mission FIN11

The recent economic climate is fundamentally different than that which came before it. Many organizations are being forced to do more with less; cut expenses while simultaneously meet increased demand for services. In this workshop, we will share some of the Nonprofit Finance Fund's most impactful tools for helping nonprofits manage through tough times, specifically those designed to assist with financial decision

making. Our intention is that participants can immediately take actionable steps to put these tools and strategies to use in their organizations following our workshop.

Specifically, this workshop will focus on:

- Best practices in creating realistic budgets
- Adopting Cash Flow Planning to forecast inflows and outflows over time
- Using Program Profitability Modeling to better understand revenue and expense dynamics for each of your organization's programs
- Integrating Scenario Planning to manage and plan for unforeseen events

This workshop is designed to encourage and support the improved financial health and long-term sustainability of organizations providing critical services and programs to the communities of Ventura County by providing nonprofit leaders with critical financial management skills and tools.

Leadership 2.0: Business Planning for Nonprofits FIN12

Nonprofits are increasingly looking for innovative ways to diversify their funding and sustain their operations outside of traditional fund development channels. Social enterprises, or earned income generating ventures, are emerging as a viable way to increase unrestricted revenue and to self-fund critical operations, programs and/or services. While each venture is distinct—with considerable variations in size, scope and offering—there is a common set of questions and considerations that should guide the business planning process.

This session will provide an overview of the social enterprise landscape; identify the key strategic options and financial models for business planning; and provide user-friendly business development tools and resources to guide planning efforts. The session will include a combination of presentation and discussion; we invite you to bring your questions and ideas.

Communicating Your Cause

Public Speaking MKT1

Does the idea of public speaking fill you with dread? Does simply reading this course description give you heart palpitations? Whether you are petrified, in need of a tune-up, or somewhere in between, the basics of this seminar will start you on your journey to a more effective and enjoyable public speaking experience. You'll need a pencil, pen, notebook, comfortable clothes, and a brief quotation that's meaningful to you.

Nonprofit Marketing: Strategic Marketing Plan MKT13

Tight budgets and tighter economic conditions make a strategic approach to nonprofit marketing and advertising a necessity. But where do you get started? What steps do you take? Attend this workshop and learn about the fundamental elements of designing an effective strategic marketing plan – including setting goals, identifying your audiences, crafting your message and successfully implementing your plan.

Nonprofit Marketing: Marketing on a Dime MKT2

Marketing and public relations are vital to every facet of your organization and, if done right, can increase the capacity of your organization and make furthering your mission easier. So how do you successfully market with a nonprofit budget? This workshop will demonstrate how non-profits can develop a marketing campaign that works for them, and how a simple (even small) investment can boost ROI and transform your organization's presence in the community, media and beyond.

Nonprofit Branding MKT3

When community members see your logo, what do they think? When donors hear your name do they immediately know what you do? Whom you serve? What impact does your organization make? What's the one thing your organization does better than everyone else?

Creating a cohesive, instantly identifiable brand for your nonprofit organization is an effective method to keep you in the minds of your stakeholders, volunteers and donors. Learn the key elements of designing and managing your nonprofit's brand image.

Hands-on Media Relations MKT4

This workshop is geared toward executive directors and senior staff who are interested in using powerful yet simply marketing tools to improve the visibility of their organizations. Each attendee will walk away with a complete press release schedule for the next 12 months, an action plan for staff to create and maintain a media list, and a crafted press release for immediate use.

Beyond the Press Release MKT5

Are you working with the media and the public to get optimal exposure for your organization? You have a press database, you send out press releases -- but you receive little or no coverage. You print flyers, send postcards, but receive few responses. What else can you do? A lot!! This class will guide you on how to maximize press coverage of your organization and set up a great word-of-mouth network to spread your message far and wide.

In Your Own Words:

How to Write an Opinion Piece That Gets Your Nonprofit's Point Across MKT21

It's great to get publicity from media outlets. But your message may get filtered in the process. By learning how to focus, write and pitch an opinion piece or op-ed, your nonprofit can get out its message directly to the public.

Colleen Cason, a long-time columnist for the Ventura County Star and a nonprofit consultant, will give you a hands-on session on how to use your passion for what you do to create effective op-eds – even for those who say they can't write.

Social Media 101 MKT22

Which social media tools are right for your organization? Real life examples of how social media has helped reach out to new audiences. Find out how all the tools can be integrated so that the time you put in reflects in the results you want. Learn basics about Facebook, LinkedIn, Twitter and get the inside scoop on some up and coming social networking tools.

Social Media for Nonprofits MKT6

New to Facebook and other social media tools? This HANDS-ON class (in the VCCF computer lab) will teach you:

- Strategy: How to plan out and implement your social media marketing strategy
- Blogs: Should you or shouldn't you? And what to consider if you do
- What Twitter is, why it's so powerful, and how to network the right way in 140 characters
- Facebook: What you need to know about Facebook before jumping in with both feet
- How to get your Facebook profiles and Fan pages up and running
- Real life examples & case studies of how social media has been successfully used

Walk away with an in depth understanding about what it really takes to leverage the social web for your nonprofit.

Web 2.0: Social Media Tools for Nonprofits MKT14

Has your nonprofit attracted new donors through Facebook or MySpace? Have you connected with supporters through LinkedIn? Do you Twitter? This session illustrates how your nonprofit should use these and many other social media tools to build awareness, raise funds, spawn viral marketing, communicate effectively, build online communities, interact with constituents, and drive traffic to your website.

We'll cover social networking, blogging, podcasting, polling, photo/video sharing, virtual worlds, search engine optimization/marketing and more. Learn how to create an effective social media presence and how to generate lots of traffic and support. We'll examine best practices from Barack Obama's campaign and other examples.

Facebook 101: Making a Facebook Page MKT18

This class is for beginners new to Facebook. Learn how to get your organization online, the difference between a profile, a page and a group. Learn how to upload pictures, post events, post status updates and how to manage a page anonymously from your personal profile. After a brief lecture, there will be hands on training to get your page functional and ready to go!

Engaging your Stakeholders with Facebook MKT19

This class is for people who have already set up their Facebook pages and want to learn how to get more activity and engagement with their fans. Learn some simple marketing tools and take your Facebook page to a new level. After a brief lecture, there will be hands on training on how to use these techniques.

Facebook: Putting it all Together MKT20

You've got a facebook page...now what? This HANDS-ON class (in the VCCF computer lab) will address the following:

- Strategy: How to plan out and implement your social media marketing strategy
- Facebook: What you need to know about Facebook before jumping in with both feet
- How to get your Facebook profiles and Fan pages up and running
- Real life examples & case studies of how social media has been successfully used

Walk away with an in depth understanding about what it really takes to leverage Facebook as a communications tool.

Crisis Communications MKT12

This WHPR Mastering The Media™ workshop covers crisis planning, strategy & communication for nonprofits. If your organization faces a crisis, this session is a must. Those not in crises will want to study the planning and preparation critical to survival when stressful times arrive. Plus, the advanced skills, techniques, strategies and tactics of crisis communication will serve you and your cause well in or out of crisis – if you're in nonprofit management or leadership, register today.

Marketing & Outreach to the Latino Community MKT7

While sometimes bound together by language and heritage, the Latino population is economically and linguistically diverse and presents a unique marketing and communication challenge to the nonprofit sector. How is your nonprofit reaching out to this growing market segment to better understand and serve its needs? Join representatives of Latino media outlets to discuss and explore the most effective and practical marketing and outreach strategies of getting your message to Latinos in Ventura County.

Marketing & Outreach to Seniors MKT8

The adage “if you build it, they will come” is not always applicable when providing services to senior citizens. This workshop will explore practical outreach and marketing strategies appropriate to getting seniors in your community engaged and accessing services. Workshop topics include sensitivities to be aware of when communicating with this audience, mediums through which to communicate, seniors' expectations, challenges communicating by phone, why different generations respond to messages in different ways, how to engage in two-way communication and how a good communication program fits into an overall marketing program for your organization. Faculty will facilitate this discussion and provide useful tools and approaches to developing marketing and outreach plans for your organization.

eMarketing: Effective Internet Strategy MKT9

This seminar shows how any nonprofit can develop and execute an Internet strategy to further its mission. We'll examine how nonprofits are using the Internet, how they'd like to be using the Internet, and how they should be using the Internet – and how to bridge that significant gap easily and quickly.

You'll learn how to drive more traffic to and fundraising through your site. We'll give specific suggestions on how you can improve your website so it will offer lots for your website visitors to SEE and lots for them to DO.

Mastering the Media MKT10

A comprehensive, hands-on workshop encompassing the basics of understanding and generating news media coverage: understanding media, finding good stories, the mechanics of news release preparation and distribution, pitching the media and more. The program includes specific tips, tactics and strategies to get you started or enhance your existing media efforts and lunch with a panel of news media professionals.

Each participant will receive a workbook and a FREE copy of Mastering The Media: Purpose, Passion & Publicity For Nonprofit & Advocacy Organizations.

Making Media Matter: Using Digital Tools to Market Your Message MKT11

The use of digital media brings nonprofit organizations to life in very unique ways. From sharing stories about your work or engaging your stakeholders in campaigns to enhance your program work, digital media brings people closer to your organization while erasing boundaries of time and geography. Are you ready for the digital age?

This production, editorial and new media training program is designed to prepare nonprofit leaders to create and distribute a piece of digital media, such as a DVD, PSA or cable program – reaching more and more of your stakeholder audiences.

Held at the CAPS-TV Media Center in Ventura, this newly designed training opportunity will include both classroom and hands-on training methods. The goal is not to master camera technique or editing but to have a complete overview of how media is created, including the production process, time and materials requirements and how to communicate with outside vendors, such as an independent production company.

Workshop topics will include: scriptwriting, producing and distributing digital media, how to get your media to the media and how to take advantage of various digital media opportunities – including using web sites more effectively and distributing messages through podcasts.

Leadership 2.0 Creating Your Communications GAME Plan MKT15

You know you need a strategic approach to communications and marketing, but where to begin? This workshop guides you along the first steps in developing an effective communications plan for your organization. Being clear about what you're trying to accomplish and who can help you achieve your goals is key to effective communications.

From there, we'll explore a wide range of approaches you can use to engage your audiences and move them to action on behalf of your organization and the issues you care about. You'll leave this session with a working GAME (Goals, Audience, Message, Engagement) Plan you can put to work immediately to jump-start your communications efforts.

Using Web Marketing to Build Meaningful Relationships MKT 16

Web marketing means making meaningful relationships. It is not about adopting web marketing tools; it is about adapting and choosing the right tools (in the right order!) based on goals, history and resources to make marketing matter.

Since every organization is different, so every approach to web marketing will vary. Learn ways to put your web marketing strategy puzzle together so your work clicks!

Attend this new web marketing workshop with Lorrie Thomas, The Marketing Therapist® and explore how to think strategically about web marketing to engage stakeholders, reach audiences and communicate the promise of your mission. Specific topics will include:

- The five success steps to web marketing
- Easy ways to build visibility and sell-ability
- Techy tips and tools that you can set up when you are back in the office to make your marketing multi-task
- The three V's that will make your nonprofit work wonders on the web

30 e-Ssential e-Tips for Your Nonprofit **MKT17**

This seminar shares 30 essential tips on how your nonprofit can use the Internet effectively -- to maximize fundraising, marketing, communication, volunteer recruitment, search engine optimization, advocacy, and much more. You'll learn what people should be able to SEE and DO on your website. The session is quite interactive (and therefore fun!), including live analysis of audience members' websites.

At the conclusion of this session, participants will:

- Understand how to use Search Engine Optimization and other techniques to drive lots more traffic to your website
- Know how to maximize your site's "conversion rate" – the percentage of your website visitors that become donors, volunteers, members, etc.
- See how to communicate with and market to various types of constituents.
- Understand what comprises a good Internet strategy and website, and how to create them quickly.

This fast-paced, interactive session examines a number of free or low-cost tools you can use to attract more donors, volunteers, and others, and get them to engage with you at a much deeper level.

Developing Sustainable Funding

Introduction to FDO **FR2**

Using this top-tier database, you can access 450,000 searchable 990s, the entire database of 91,500 grantmakers and 1.25 million grants, and exclusive funder portfolios featuring news, requests for proposals, key staff affiliations, printable color charts illustrating grant distributions, and more. Join us at our free monthly orientation session and receive hands-on assistance with this powerful online resource.

Fund Development & Prospect Research **FR3**

Do you know all the funders who could support your work? Do you know the right amount to request? What are the magic words to get someone to read past the first sentence of your letter? This class will teach you how to research corporations, foundations and individuals so that you find more funders who are interested in what you do, find out what they're funding and how much they really give, and how to approach them to maximize your success.

You'll learn: how to find new donors for your organization and how to increase funding from current donors; how to read a 990; how to research "competing" non-profits to find new donors; which of your current donors make the best planned giving prospects; and how to get free advice from non-profit professionals.

Introduction to Fundraising Planning **FR20**

A successful nonprofit organization needs to cultivate multiple revenue streams through sound financial planning. If your organization has never developed a fundraising plan or calendar, this workshop is for you!

Through examples and discussion, this session will provide an overview of the process of thinking strategically through the components of a fundraising plan. You'll learn how to conduct an assets inventory, develop a case statement, identify fundraising partners, and prepare a fundraising calendar.

How to Approach a Foundation FR4

In preparation for meaningful participation in our Meet the Grantmakers convenings, join us for this exciting new workshop! This workshop is intended for those with some experience under their belts, though not necessarily with foundations. Workshop topics will include how to initiate contact with potential funders, plan calls and meetings, and build partnerships with donors.

Compelling Case Statement FR5

The statement of need is the heart of any successful grant proposal. With it, you describe in a succinct way why your grant project is necessary. While this may be obvious to you, the proposal writer, the need statement presents you with the opportunity to convince the funder of that importance. Designed for beginners as well as experienced grant seekers, this workshop will help you master a key step in proposal writing...constructing a compelling statement of need.

Writing the Project Description FR6

What do you propose to do? Why should it be done? What impact do you plan to make? How will you measure success? The project description is one of the most important components of a successful proposal. A strongly articulated project description allows you to engage a funder in your important work by demonstrating a well developed plan of action.

This workshop provides an in-depth look into the preparation and writing of the project description section of a proposal, including clear and concise goals, objectives, activities and evaluation methods.

Budgeting Basics for Proposals FR7

Using case studies and real-life examples, this workshop provides the skills necessary to meet grantmaker requirements for budgets. Topics include: the difference between budgets and income/expense statements, common program and indirect costs, and budget justifications. This class is recommended for anyone who has ever struggled with a proposal budget or who has enrolled in Introduction to Proposal Writing.

Meet the Grantmakers FR1

Come join our Meet the Grantmakers convening this quarter! This highly productive panel discussion will provide a unique opportunity to engage face to face with private and corporate foundation representatives. They will explain what they are looking for in successful proposals and how best to determine foundation fit. The events will afford ample time for questions and answers, networking, and strengthening relationships with foundation representatives.

Critical Issues in Good Grantsmanship FR35

Join an esteemed panel of grantmakers and grantwriters as we explore best and promising practices in successful grantsmanship! Structured as a panel discussion of grantsmanship experts, this workshop will afford attendees multiple points of view and diverse perspectives about the following:

- Designing effective programs that meet the needs of your community
- Packaging your organization and its programs into winning proposals
- Find funders that fit
- Brokering meaningful relationships with program officers and other Foundation representatives
- Creating systems of grant accountability and reporting

Come ready to actively participate and ask questions of our faculty- the experts!

Introduction to Proposal Writing FR8

Perfect for the first-time grant writer or those interested in brushing up on the fundamentals, this introductory workshop provides an overview of the art of prospect research and proposal writing. Through rich discussion and hands-on writing exercises, workshop attendees will learn how to use both print and electronic resources available in the VCCF Library for Nonprofit Research and Development and explore the basics of writing a winning proposal. Topics include: how proposals relate to strategic planning and program planning, grant research, grant writing terminology and basic components of a proposal.

At the end of the two sessions, attendees will have developed an outline and draft proposal. Come prepared to write and please bring copies of your organization's mission statement, project descriptions and background materials.

Intermediate Grantwriting FR9

This intensive, four-part workshop was created for individuals with at least one-year grantwriting experience or who have recently completed our Introduction to Proposal Writing workshop or Grantwriting Bootcamp. Through instruction and practical exercises, the workshop will teach participants a step-by-step approach to preparing successful proposals and then provide the opportunity for proposal review and feedback.

During Day One & Two, the workshops will familiarize participants with the stages of preparing a winning proposal, including: program planning, creating measurable objectives, outcomes and timelines, targeting funding research and reading "between the lines" of foundation grant guidelines.

Day Three is an optional writing clinic in our Technology Center where participants are encouraged to join faculty Carrie Roberts and work on writing their proposal.

Day Four, participants will sign up for individualized coaching sessions with Carrie focusing on the proposal you developed and the research you did. Grantsmanship topics will also be discussed.

Write Here, Right Now / Monday Night Grantwriting FR21

This workshop series will include a step-by-step guide to planning and writing a Letter of Inquiry (LOI) which most funders now require before inviting full grant proposals. This is a class for anyone who works with or for nonprofit organizations applying for any grant -- regardless of your track record, experience, or organizational budget.

Each participant receives a FREE copy of Jon O'Brien's book RIGHT BEFORE YOU WRITE: the Groundbreaking Planning Process Used to Win More Than \$385 Million in Competitive Grant Awards. Upon completion of the six modules, Jon will offer a lifetime pass, meaning he will answer questions, coach participants through the process of applying for future grants and read and critique your future submissions!

Week #1 Jon's Almost World Famous Seven Cs!

How FUNdamental storytelling principles used by Hollywood's top screenwriters can help better your writing by bettering your thinking.

Week #2 Retooling Your Gray Matter

"Tricks of the trade" to make your program design more compelling, competitive and fundable.

Week #3 Ask Not What Your Funder Can Do For You But What You Can Do For Your Funder

A new way to look for and approach funders.

Week #4 Right Before You Write

Everything you need to know about the planning and writing of WINNING LOIs.

Week #5 Right Writes Itself

Writing styles of the funded and successful.

Week #6 Show and Tell

Receive individualized feedback on your completed program design.

Beyond the Seven C's FR36

This seminar series is designed to help nonprofit professionals master the increasingly complex and competitive process of researching, designing and writing successful grant proposals.

Featuring real-world projects and challenges, in-depth case studies, the latest insight on current trends, high-energy brainstorming, roundtable discussions with nonprofit experts, and ongoing individual and group feedback from professional peers -- Beyond The Seven Cs! is designed to take each participant's thinking, writing and program design skills to the next level.

Last year, each participant completed the workshop boasting of success: taking their writing to the next level, completing applications for more complex and bigger budgeted applications, completing their first job as a professional grant writer or winning a grant award for their nonprofit! Participants in the workshop represented a wide range level of expertise and knowledge: established grant writers, nonprofit professionals, and professionals from other disciplines transitioning into nonprofit or grant writing careers.

The limited class size of this workshop allows for content personalization and individual attention designed to create an optimal learning environment of mutual trust and respect that will lead to meeting your professional goals.

The facilitator and member of the VCCF faculty, Jonathan O'Brien, thd, is known for his sold out workshops throughout the state based on his book [RIGHT BEFORE YOU WRITE: The Ground Breaking Planning Process Used To Win More Than \\$385 Million In Competitive Grant Awards.](#)

Invest in this unique, once-a-year opportunity to help yourself and your nonprofit identify, strengthen, and improve your program design and grant writing skills. Bring in your real-world project (LOI or short application) and get ready to work with this advanced group to transform your program into a compelling, competitive and fundable grant winner! If you don't have a specific program or grant, that's okay too -- you'll work with someone who does.

Get Ready for Government Grants FR10

Part I: Are you familiar with Grants.gov? Have you ever considered applying for Federal funding?

Grants.gov allows organizations to electronically find and apply for competitive grant opportunities from all Federal grantmaking agencies. Attend this workshop and walk through the process of applying for Federal sources of funding. Participants will learn tips and tools for navigating the grants.gov process and will create a tailored checklist of information and documents needed to register with the CCR.

The workshop will also discuss federal grantmanship topics such as identifying federal funding opportunities, responding to Requests for Proposal from Federal agencies and what to expect when you receive funding from the federal government.

Part II: This class will give participants an overview of the technical writing required to successfully compile a government grant application. Participants will review scoring mechanisms; organize writing materials; reviews components necessary in a project statement/narrative.

This class focuses on writing a quality project statement/narrative; writing to the rules and guidelines of a specific grant program; meeting competitive and non-competitive program requirements and addresses the measurement of objectives.

Refine Your Proposal FR22

Is your proposal an effective communications piece for your organization? Your proposals often make it to the foundation and corporate donors before you do. Do they represent your best thinking? Is your writing clear and succinct? Are your outcomes and objectives compelling? Is your needs statement linked to the solutions you propose? In this fast-paced workshop, real life examples will be interwoven with an overview of the characteristics of winning proposals. You will also learn about your own personal writing style and receive an error analysis based on your own writing sample.

Participants are eligible to submit draft proposals (up to 5 pages) in advance, for review and critique. This is a wonderful opportunity to get expert individualized attention worth over \$500 in grantwriting consulting fees!! Space is limited to 10 attendees.

Using Your Strategic Plan to Improve Fundraising FR27

“We need to raise money to support our programs! How do we do it?” That question is usually posed at the beginning of every fundraising effort and requires that you look backward before you move forward. Fundraising does not begin with recognizing the need for money. It begins much earlier and is couched in your organization’s strategic plan.

Attend this workshop and learn how fundraising can be improved when it is part of a strategic planning effort, how planning and fundraising go hand and hand and how you can get started toward fundraising success.

Marketing and Communications: the Cornerstones to Successful Fundraising FR28

In this half-day workshop, attendees will learn Marketing Principles and how they enhance the fundraising and development process. You will also learn how to create a written marketing plan that can be utilized by your organization for immediate results. You will learn the important elements of cause-related marketing and the power of personalized marketing methods.

Annual Giving and Corporate Development Strategies FR29

In this half-day workshop, participants will learn the “Six Step Process in Successful Membership Development Programs”. You will also be introduced to a successful model for creating your own corporate development program targeting small and midsize businesses in your market. You will learn effective techniques on how to maximize Board Member productivity while minimizing their time involvement.

Special Event Marketing and Management FR30

In this half-day workshop, you will learn how to create an effective event timeline and check list for success. Special emphasis will be given to attracting corporate sponsors and celebrities to your events. You will also learn how to work with volunteers to maximize their efforts and keep them motivated. This course will help you avoid the pitfalls and missteps in planning and executing your special events that can create financial disasters.

Special Events Panel: Lessons from the Trenches FR44

Whether to raise funds or make friends, the nonprofit special event plays a critical role in the work we do. They may serve the purpose of raising awareness of a particular issue, be to educate the community about our organization, or to expand our donor base and add to our annual giving. Whatever the reason, successful special events require careful advanced planning, setting reasonable goals and careful attention to detail.

Join us for a stimulating panel discussion with experienced nonprofit professionals and special event planners who will share their knowledge of what it takes, what they have learned and what pitfalls to avoid!

Managing and Fundraising in Challenging Times FR31

If you're worried about surviving and thriving in the current economy, you're not alone. The good news: despite many economic ups and downs, giving from individual donors increased 39 out of the last 40 years. Leave the "panic glasses" in the office and join us for a conversation how best to survive and thrive in challenging times.

Training Topics Include:

- Program planning and protecting core programs
- Collaboration with peers and partners
- Contingency planning and budgeting
- Diversifying your income
- Financial management tips you can apply now

Preparing for a Capital Campaign FR23

This workshop will provide an opportunity for you to assess your readiness for a capital campaign. Topics will include project feasibility studies, setting campaign goals, recruiting a campaign team, working with a consultant, managing the campaign and much more. This is an essential workshop for any nonprofit organization that is preparing to raise money for capital.

Special Events FR34

Whether you are planning to produce a tennis tournament or testimonial dinner, this workshop will give you all the ingredients necessary to make any special event – large or small – a smashing success! Participants will learn how to determine the purpose of a special event and its target audience, how to match the event to the group's objectives and resources. This is a great opportunity to network ideas. Come with questions!

Maximizing Auction Results FR11

Looking for ways to increase revenues at your next benefit auction? Interested in approaches to relieve planning and management stress? Join benefit auction experts as they share practical and proven approaches that have helped organizations of all types yield tremendous success.

From this three hour workshop, you will not only walk away with ideas, but with actual tools and strategies that you can immediately apply to your next event to achieve greater financial results and a guest experience that inspires future support.

At this workshop, you will learn how to:

- Increase event revenues
- Ensure a great guest experience
- Stimulate bidder participation
- Run a smooth & successful event

Social Network Fundraising FR12

Are your donations or grants shrinking? Are you tired of hearing “you’ve got to get on Facebook!” but don’t know how or why? Do you want to fundraise like President Obama?

In this workshop, we will introduce you to many elements of the social web - from blogs to social networks. But more than just an introduction, we will discuss how to integrate social media, online outreach and your current fundraising approaches into a more effective online fundraising engine. Plus, we’ll show you how other nonprofits are leveraging social media to become sustainable fundraisers in any economy.

Maximize Fundraising through Your Website FR13

Your website has two strategic objectives – first, to inform the website visitor about your organization and its mission. However, the second, more important objective is to get the website visitor to SUPPORT your nonprofit.

Learn how to plan and build a site which not only has a lot for the user to see, but a lot for the user to do as well. Consider the impact of a site that offers online donations, event tickets, membership dues, e-store purchases, affiliate marketing, in-kind donations, planned gifts, and investment donations.

Introduction to Corporate Giving FR14

Seeking to target companies that might fund your organization? Finding it hard to get information? Need to get beyond the Yellow Pages? Join us for an introduction to the world of corporate support for nonprofits. In this workshop, we’ll discuss corporate sponsorships and cause related marketing, and illustrate how you can determine the most viable options for corporate partnership with your organization.

Donor Retention and Cultivation FR15

Broadening and deepening relationships with new and existing donors is essential to fund development. It is critical that time is spent “courting” the prospect. This requires time, patience and perseverance. It is important to really get to know the donor: learn what they care about, what motivates them to give, and what their gift capacity is. This workshop will address practical strategies to ensure rich relationships with your existing donor base as well as cultivate relationships with new ones.

Earned Income Strategies for Nonprofits **FR32**

Heard the buzz about Social Enterprise but not sure what it is all about? Interested in learning more about how some nonprofit organizations are blending social mission with earned income revenue streams to increase social impact and build program sustainability? More than just thrift stores and ticket sales, social enterprise is a growing field of practitioners that seek measurable economic and social value to better meet the needs of disadvantaged communities. Hear why some nonprofit organizations are embracing social enterprise for its potential to transform the nonprofit sector's quest for sustainability and scale. Attend this workshop session to learn more about:

- national trends and local examples
- definitions of the terms most often associated with the field
- the risks and legal aspects associated with social enterprise
- the perspective of funders and social investors
- how peer-to-peer leadership forums create value for social enterprise leaders
- the exciting activities taking place in Southern California to advance the field and how your organization can get involved

Building Blocks of a Planned Giving Program **FR16**

Planned giving fundraising plays a significant role in the success of every non-profit. Not only do planned gifts help ensure the future of the organization, but they offer every donor an opportunity to leave a personal legacy with his/her charity of choice.

Many planned gift vehicles also provide welcome benefits for the donors. This workshop will discuss the building blocks necessary to create this valuable program, including a prospective donor base, marketing strategies, and gift acceptance guidelines. A detailed exploration of several types of planned giving options will also be provided.

Marketing Your Planned Giving Program **FR33**

Marketing is essential to the success of a planned giving program. Not only does it communicate the mission of your organization to your constituents, but it shares information on the various ways in which they can support the charity and provides the development staff with a method for prospect identification. This program will focus on current marketing techniques, understanding the different market segments, and how to create a successful marketing plan.

Gift Acceptance Policies **FR18**

Gift acceptance policies are critical in providing discipline for a successful nonprofit fundraising program. The policies define for the nonprofit what types of gifts it may accept, which types of assets are appropriate for the gifts, and how and by whom they will be administered. They detail the processes of evaluation and approval for each gift arrangement and remind the organization when to say "No."

This workshop will discuss the drafting of these policies and walk step-by-step through the various segments that should be included.

Planned Giving Case Studies **FR24**

A discussion of planned giving can often be too technical and complicated. This session will break down several planned gift case studies so they can be analyzed and understood piece by piece. We will explore a charitable remainder trust, a charitable lead trust, and a variety of other planned gift scenarios. This workshop is perfect for those just getting started with a planned giving program.

Endowment Fundamentals FR19

Designed for Nonprofit CEOs, Development Staff, and Board Members, this free workshop will discuss the fundamentals of building an endowment, the importance of policies, oversight and strategies and how portfolios can be constructed to provide long term growth.

Learn about the significant benefits endowments can secure for the future of an organization, what donors look for in making endowment gifts, and the basics of creating and sustaining an endowment. Perfect for current endowment fund holders as well as those interested in starting an endowment.

Charitable Gift Annuities FR17

A charitable gift annuity is one of the simplest planned gifts available to donors. Mutually beneficial, this giving vehicle offers the donor lifetime additional income (some of which is tax-free), a charitable income tax deduction, and the opportunity to leave a legacy with a nonprofit organization. Rates are very attractive!

VCCF is the only nonprofit in the county offering charitable gift annuities that can benefit any charity of the donor's choosing. Join us for this informative seminar to learn the ABC's of the charitable gift annuity and how it can benefit both your donors and your nonprofit.

Donations Through Texting FR37

The number of mobile phones in the world is predicted to hit 5 billion by the year's end. By comparison, we just passed the 1 billion mark for PCs. What does our mobile society mean for the nonprofit sector? How can your organization connect with mobile users? What should you measure to determine success?

Managing the mobile hype against the realities of how to begin -- and starting with the proper first steps and strategy -- can mean the difference between success and failure for your mobile strategy. Join us for a seminar diving into the nuts and bolts of mobile programs including the following hot topics:

- Mobile Marketing
- Mobile Fundraising: Cannibalization or Augmentation
- Mobile Advocacy and Program Delivery

Whether your nonprofit needs to begin building its mobile list or wants to develop mobile fundraising, donor acquisition, marketing, and advocacy strategies, this workshop will help you lay the groundwork.

Writing Your Annual Appeal FR42

What if you could write something so persuasive that people would send you thousands of dollars? 'Tis the season... for holiday direct mail appeals. Learn how to write and produce an appeal that will compel your donors and prospects to send money immediately to underwrite your efforts.

More than 100,000 people have received a direct mail appeal written by Katherine Wertheim, CFRE, and she has produced five million-piece mailings. She can tell you how to design, write and produce your holiday appeal for maximum effect. Whether you've written dozens of appeals or none at all, you'll find this class educational and informative. You'll never look the same way at "junk" mail again. Feel free to bring your past mailings or holiday draft to class for comments.

Major Donor Relationship Building FR38

How can you create major donor relationships that will pay off for both your organization and the donors? Demystify major donor fundraising and learn the top 5 things that can dramatically shift your relationships with your donors and prospects, leading to greater connection and greater investment.

Learn both how to raise dollars in a few weeks (especially important during the holiday season) and how to cultivate over the long term. Take away action steps, materials and accountability support to help you immediately move forward with the right relationships in the best way for your fundraising success. To get the most out of this workshop, a board member/ fundraising committee chair and executive/development staff member would gain from attending together.

Attracting New Donors and Leaders FR45

There are people who could greatly improve your organization, bringing you wider connections, greater leadership, wealthier donors and of course more money. But where are they? How do you reach them? And how do you make your organization distinctive among all the other nonprofits who are trying to get them?

In this class, you'll learn: how to bring in new leaders, donors and volunteers; how to use short, quick, free events to attract new people; how to get terrific, hard-working new board members from groups you don't know; how to get volunteers to do your social media for you; how to get CEOs to recommend you; and much more.

How would you like results like these: A man who, before he even joins the board, asks for and gets a new \$50,000 gift? Getting 300 potential volunteers to your offices in just one week? Raising \$2,400 from one new, repeatable event with just eight days to plan it? All these results happened during the recession.

You'll also get 20 pages of handouts that you can use to: get CEOs to recommend new leaders for you; meet with 12 ministers at once; get four new board members; hold a one-hour event to raise \$1,000 or more, repeatedly; involve teenagers to fulfill your wish list; and more.

L2.0 Major Gifts Fundraising: The Art of the Ask FR41

What if you could meet with dozens of people who could give you a check for \$1,000 or more in just the next four weeks? Learn how to raise dollars in a few weeks and how to cultivate over the long term. Take away action steps, materials and accountability support to help you immediately move forward with the right relationships in the best way for your fundraising success.

The systems you'll learn in this class are easy to do, are low-cost, and can be performed quickly by just a couple of people. You'll learn how to convert current donors to major gifts donors, how to get appointments quickly and easily, what to say and do in a meeting, the four kinds of "No," and how to get volunteers to help you.

L2.0 Relationship Building for Prosperity: How to Create a Strong Major Donor Program FR43

How can you create major donor relationships that will pay off for both your organization and the donors? Demystify major donor fundraising and dramatically shift your relationships with your donors and prospects, leading to greater connection and greater investment.

Learn both how to raise dollars in a few weeks (especially important during the holiday season) and how to cultivate over the long term. Create plans to approach past donors for larger gifts and potential donors who don't know your organization. Take away action steps and materials to help you immediately move forward with the right relationships in the best way for your fundraising success.

Online Fundraising During a Recession FR39

This seminar shows how any nonprofit can develop and execute an Internet strategy to further its mission during difficult economic times. This topic is presented with an overall theme of hope and opportunity, not doom and despair. We'll examine how fundraising typically does not suffer as much as expected during a recession. We'll examine how nonprofits are using the Internet, how they'd like to be using the Internet, and how they should be using the Internet (but may be unaware of) - and how to bridge that significant gap easily and quickly.

Fundraising in Challenging Times FR40

Wondering how your nonprofit will manage in this economic downturn? This class will give you a basic overview of what you can do to survive, thrive, and succeed in sustaining your nonprofit during the current economic crisis. What we'll cover:

- What you can do to make sure that your nonprofit is positioned to weather the current economic situation.
- The impact of the downturn on philanthropic giving, and how to adapt your fundraising methods and strategies in the current economy.
- Links and resources that will help you to explore approaches that best fit with your nonprofit's situation.

Fundraising Seminar Series FR25

The leaders of small nonprofit organizations often find themselves faced with the challenge of raising funds with few resources to accomplish the task. Yet staff and board members of these grassroots groups have the same responsibility for fundraising as their counterparts at larger nonprofits. This series of workshops on fundraising aims to build the capacity of local organizations (with annual budgets of less than \$250,000). The aim is to create a learning community in which each participant both learns and leads.

In partnership with Pepperdine University, the Fundraising Seminar Series provides an opportunity for a small group of grassroots nonprofit organizations to receive fundraising planning and technical assistance. The program results in the development of a strategic fundraising plan to guide each of the participating agencies. The seminar series will consist of three phases: 1) assessing fundraising readiness of the organization; 2) learning about fundraising strategies and tactics; and 3) developing a plan that includes fundraising objectives and strategies for each income source.

Participating nonprofit professionals will be required to participate in the orientation plus four sessions over a 12-15 week period. Specific deliverables include:

- Fundraising Assessment Survey to be completed by the participating nonprofit professional and analyzed by the student team.
- Stakeholder interviews to assess fundraising readiness (conducted by members of the student team).
- Individual assistance in developing a fundraising plan. The consulting team will assist participants in completing a draft strategic fundraising plan document.

Planned Giving Institute FR26

The Planned Giving Institute is a comprehensive effort to expand resources available to Ventura County nonprofit organizations through planned and deferred gifts. The concept, modeled on the successful efforts of the Community Foundation of Santa Cruz, involves hiring dedicated staff skilled and experienced in planned and deferred giving and making that staff expertise available to work directly with nonprofit organizations to build charitable capital through gift annuities, bequests and planned gifts. We are happy to

provide individualized service for up to six hours a month for ten months of the year. Services may include, but are not limited to, the following:

- Board presentations (collectively and/or with individual board members)
- Staff training
- Marketing strategies
- Gift Acceptance policies and procedures
- Donor visits
- Preparation of sample gift calculations

The PGI is an extension of how VCCF's mission to "promote and enable philanthropy to improve our community for good for ever" engages nonprofits throughout Ventura County. It is our pleasure to partner with you to help enhance the financial future of your organization and enable donors throughout our community to leave legacies for the causes they love.

Technology Works for Nonprofits

Internet / Technology Privacy T0

The focus of this workshop is to explore and discuss the issues surrounding privacy in a digital world and on the Internet specifically. We will discuss the various aspects of privacy and your role as an individual or organization as well as general tools and practices that you can use to protect yourself.

Access

Get Going: Database Design & Tables T1

This class gives you the core database knowledge and prepares you to build an Access database that will be able to grow with your organization. Next we start actually building the database, paying special attention to making sound decisions make your database robust and error resistant.

- Getting started
- Databases and tables
- Fields and records
- Data entry rules

Get Going: Queries, Forms & Reports T2

In this class we will develop queries to start using our data in new and creative ways. We will discuss how to filter and change data to prepare it for use in forms and reports and we will learn how to use the various tools to change large amounts of data with minimal effort. We will learn how to use forms to simplify data entry and enforce our data standards. We will also use reports to define useful and good looking output for our data.

- Basic queries
- Using forms
- Working with reports

Do More: Advanced Tables and Queries T3

Move beyond the basics and learn how to make your tables and queries more robust, reduce data errors and make data retrieval a snap!

- Relational databases
- Related tables
- Complex queries

Do More: Advanced Forms and Reports T4

Learn how to make data entry and develop dynamic reports that give you exactly the information you need when you need it.

- Advanced form design
- Reports and printing
- Charts

Do More: Advanced Queries and Macros T5

Take your queries beyond the QBE grid and learn how to add SQL commands to make complex queries. Begin automating your tasks, saving time, and checking for correctness using VBA macros.

- Querying with SQL
- Advanced queries
- Macros
- Advanced macros

Do More: External Data and Internet Integration T6

Learn how to incorporate data from external data sources either for one-time import or for on-going data connections. Find out how to make your database web accessible for in-house or public use.

- Importing, exporting, and linking
- Database management
- Internet integration

Do More: Access Bootcamp T7

Build a complete database in one day! This class is for users with a basic understanding of Access who want to experience the entire process end-to-end with expert help. We will build a basic Donor Management database, and you will learn the skills needed to develop any database for your organization's needs.

- Database design
- Table design
- Data Import
- Query design
- Form Design
- Report Design
- Integration with Microsoft Word

Master Class: Application Development T8

Take your database to the next level by turning it into an application. Learn the core concepts required to ensure that your application works as intended for your users and database administrators.

- Application design
- Advanced form design
- Dialog boxes and macros
- Application navigation
- Custom menus and navigation groups

Excel

Get Going: Fundamentals T9

Fear the blank spreadsheet no longer! This class introduces you to Excel and provides you with core knowledge of how spreadsheets work. We will discuss how to use Excel as a data management tool as well as a calculation tool.

- Getting started
- Entering and editing data
- Modifying a worksheet
- Using functions

Get Going: Fundamentals Plus T10

Take your Excel skills to the next level. In this class we will learn how to take raw data and format it for multiple purposes. We will also learn how to use the various data lookup methods and combine them with dynamic dropdown boxes to make your reports flexible and reusable.

- Formatting worksheets
- Printing
- Using multiple worksheets and workbooks
- Advanced formatting

Do More: Charts and Printing T11

Learn how to create charts that correctly convey the meaning of your data visually. Discover the key tools and techniques to ensure constant quality that you can either print or include in other Microsoft Office documents.

- Creating Standard Charts
- Modifying charts
- Layouts and Styles
- Advanced Charting
- Print Options
- Printing Charts
- Printing Large Workbooks

Do More: Formulas and Functions T12

You have avoided formulas in Excel, but you know that they are useful. This class is for you! We will start by reinforcing the core knowledge of cell references and then progress to developing formulas for text manipulation and calculation. You will also learn how to use Excel functions and how to select the ones that will help you accomplish your task.

- Understanding Formulas
- Understanding Cell References
- Understanding Functions
- Using Formulas and Functions Together

Do More: Budget Workshop T13

We will create an entire multi-department budget that uses all of the skills from our Get Going and Formulas & Functions classes. The goal is to show you how to put all of the tools together to make an Excel workbook that ensures that your data is correct and easy to manage.

- Table of Contents
- Workbook design
- Data setup
- Named Ranges
- Data tabulation and Error Checking
- Subtotals and Outlines
- Conditional Formatting
- Charts and Graphs
- What-If Analysis

Do More: Pivot Tables and Pivot Charts T14

Learn how to use the power of Pivot Tables to find information and knowledge hidden in your with copying and pasting. Create dynamic tables and Pivot Charts that are automatically updated as your data changes.

- Working with PivotTables
- Rearranging PivotTables
- Formatting PivotTables
- PivotCharts

Do More: Data and List Management T15

Get more power out of the lists your are managing in Excel. Learn how to dynamically select data from the list, build in error checking, use the sorting and filtering tools, and integrate the data with other applications for database imports or mail merges.

- Lookups and data tables
- Advanced list management
- Exporting and importing

Get Going: Mail Merge with Excel, Access and Outlook**T16**

Mail merge is a core activity of almost any organization. But how do you do it efficiently in a repeatable manner? This class will show you how to create multiple mail merges using the information that you already have in Outlook, Access, or Excel.

- Data Cleanup and Management
- Merge Document Creation
- Data Selection
- Dynamic and Conditional Content
- Merge to Email
- Other Types of Merge Documents

Mail Merge: End to End**T41**

In this class we will cover the step by step actions needed to ensure that you have "clean" data to use in your merge as well as reviewing how to create solid documents to incorporate the merge data. We will use Microsoft Excel and Access on the data storage side and Microsoft Word and Publisher for developing merged documents.

Master Class: Advanced Formulas, Editing and Formatting**T17**

Learn how to get more out of your formulas and functions by using innovative techniques to dynamically located and use your data effectively. Create "what-if" models that support your decision processes.

- Advanced formulas
- Functions, and arrays
- Advanced editing and formatting

Master Class: Macros, Customization and Automation**T18**

Learn how to automate and customize your workbooks to handle repetitive tasks, handle error-checking, and ensure that formatting standards are enforced.

- Macros and custom functions
- Advanced customization
- Automation

Master Class: Using Excel with VBA**T19**

Build logic and functionality into your Excel workbooks using VBA. Learn how to provide useful feedback and direction to your users to ensure that your workbooks are as useful as possible.

- Visual Basic Editor
- Programming basics
- Control structures
- Custom dialog boxes
- Debugging and error handling

Master Class – Charts, Pivot Tables & Dynamic Data**T42**

In this class you will learn how to incorporate data from multiple sources into your Excel workbooks and then use that information to generate both standard charts as well as Pivot Charts and Pivot Tables.

Outlook

Get Going: Fundamentals T20

This class is for the novice Outlook user or any user that wants a better understanding of Outlook fundamentals. Outlook provides an integrated solution for managing your time and information, connecting across boundaries, and remaining in control of the information that reaches you.

Outlook delivers innovations you can use to quickly search your communications, organize your work, and better share your information with others — all from one place.

- Getting started
- E-mail management
- Contact management

Get Going: Fundamentals Plus T21

Outlook is more than email! Learn how to use the full power of Outlook to help you organize and manage your email, contacts, tasks, and appointments in a way that increases your ability to manage your schedule and communications.

- Tasks
- Appointments and events
- Meeting requests and responses
- Customizing Outlook
- Customizing messages
- Organizing items
- Folders
- Organizing Mail
- Notes and Journal folders
- Calendar and Contacts
- Collaboration Features
- Templates and Forms

Powerpoint

Get Going: Fundamentals T22

Presentations are now a standard part of any organization. This class shows you how to quickly and efficiently develop a presentation that looks good, is flexible, and most importantly, gets your message across.

- Getting started
- New presentations
- Formatting slides
- Drawing objects
- Graphics
- Tables and charts

Do More: Multimedia and Animation T23

Take your PowerPoint skills to the next level. We will focus on building animations and incorporating multimedia elements to help you get your point across in a visually exciting and pleasing-to-the-eye manner.

- Clip art and Images
- Media clips
- Animations

Do More: Presentation Workshop T24

We will take a great looking presentation from concept to completion. You will learn all of the essential steps, planning issues, and design choices that are involved in delivering a great looking product. Prerequisite: PowerPoint Get Going or equivalent experience

- Customizing presentations
- Graphics, movies, and sound effects
- Customizing SmartArt graphics and tables
- Photo albums and animation
- Delivery options

Powerpoint: Master Class – Animation, Multimedia & Dynamic Data T44

We will discuss the key aspects of using audio and video files in PowerPoint as well as how to use and leverage PowerPoint's built-in animation tools and capabilities. Additionally, we will incorporate dynamic data into the presentation so you can ensure that your information is always correct.

Publisher

Get Going: Fundamentals T25

Learn the core features of Publisher and the core skills needed to get your projects created and out the door. We will also cover basic design and layout skills and strategies.

- Getting started
- Basic documents
- Multi-page publications
- Working with text

Get Going: Fundamentals Plus T26

Learn how to add additional design elements and take greater control of the your text during the creation and finalization of your design projects. We will also discuss the production and cost issues that you consider early in your project.

- Tables
- Layout and design techniques
- Finalizing documents

Do More: Design and Typography T27

We will go into greater detail about how to implement various core design philosophies depending on the type of project, intended audience, and cost elements. We will also look at various ways of incorporating strong design elements into long publications.

- Basic design options
- Typography
- Long publications

Do More: Mail Merge and Interactive Forms T28

We will learn how to use the mail merge features to develop personalized design documents for your organizational needs. We will also learn how to develop, deploy, and manage custom forms with Publisher as well as understanding the underlying issues that must be considered.

- Mail merge
- Interactive forms

Publisher: End to End T43

This class is geared for the user who has hands on experience with Publisher, but is looking to optimize their use of the program instead of just "stumbling" to the finish line. You will be provided with raw information and artifacts and will proceed step-by-step through the development process to a completed product.

Word

Get Going: Fundamentals T29

Microsoft Word is the workhorse of most organizations. This class focuses on the fundamentals and ensuring that you understand all of the core features of Word and gives you insight into the more advanced features that you may like to utilize in the future.

- Getting started
- Navigation and selection techniques
- Editing text
- Formatting text

Get Going: Fundamentals Plus T30

If you have been using Word for awhile, this class will show you how to use it more effectively.

- Tables
- Page layout
- Proofing and printing documents
- Graphics

Do More: Styles, Themes and Advanced Formatting T31

Word 2007 introduced a new concept for styles and themes. Learn how to leverage these new tools along with other core formatting concepts and techniques to quickly develop consistently good looking documents.

- Styles
- Themes
- Sections and columns
- Formatting tables

Do More: Templates, Building Blocks and Graphics T32

Learn how to leverage pre-designed templates as well as create your own. Also learn how to use the new Word 2007 building blocks to quickly create documents based on reusable content from multiple sources.

- Templates and building blocks
- Graphics
- Managing document revisions
- Web features

Do More: Forms and Long Documents T33

Learn how to create fillable form in Word. Also, learn the techniques and strategies for creating and managing long documents in a high-quality and time efficient manner.

- Objects and backgrounds
- Forms
- Long documents

Do More: Mail Merge with Excel, Outlook and Word T34

Mail merge is a core activity of almost any organization. But how do you do it efficiently in a repeatable manner? This class will show you how to create multiple mail merges using the information that you already have in Outlook, Access, or Excel.

- Data Cleanup and Management
- Merge Document Creation
- Data Selection
- Dynamic and Conditional Content
- Merge to Email
- Other Types of Merge Documents

Do More: Newsletters and Flyers T35

You need to do some basic publishing but do not have the software or resources to learn a new application? This course will cover how to use Microsoft Word as a tool for creating exciting, colorful brochures, flyers and event program schedules.

- Planning and Design
- Key Tools & Key Techniques
- Using Templates
- Using Graphics
- Managing Type

QuickBooks

Get Going with QuickBooks: Basics for the Non-Accountant T38

This course introduces QuickBooks functions and how easy and non-threatening the program can be to navigate. Paying bills, writing checks and developing a financial report in just a few steps: Who says we need an accountant to get a report?

Get Going with QuickBooks: Setup Decisions & Application Overview T39

This course will assist you in making setup decisions and help you identify the key information that you will need to successfully set-up QuickBooks.

Get Going with QuickBooks: Making the Decision T40

This course will assist management staff and board members to identify the need for using a computerized accounting system.

Included is a brief overview of QuickBooks and how it can work for your organization.

Visual Basic for Applications**Master Class: Using VBA T36**

Take the final step in your mastery of Word by learning how to leverage the power of VBA to automate tasks and add features such as error checking, automatic formatting, and more to your documents.

- Getting started with the Visual Basic Editor
- Programming basics
- Word objects
- Control structures
- Forms
- Debugging and error-handling

Master Class: VBA Programming T37

Learn how to leverage the power of VBA to make your database more robust, flexible, and easier to use.

- Visual Basic Editor
- Programming basics
- Control structures
- ActiveX Data Objects
- VBA debugging tools