

Nonprofit Financial Management Essentials

April 29, 2008 | 9:00 am - 4:00 pm | Oakland

This workshop is designed to give nonprofit managers the tools to better understand and control the financial health of their organizations. If you have ever felt intimidated by the numbers presented to you by your bookkeeper, accountant, or auditor then this is the workshop for you! Topics covered include: internal systems and controls, how to read financial statements, allocating costs (direct, shared, and indirect), and preparing for an audit. Participants are encouraged to bring reports and questions from their own organizations.

Who should attend: executive directors, senior managers and board members with non-finance backgrounds.

10 Mistakes Nonprofits Make When Creating Communications Materials

April 2, 2008 | 9:00 am - 11:00 am | Oakland

Mission Minded's popular presentation comes to the East Bay! Led by Mission Minded founding partners, Jennie Winton and Zach Hochstadt, this two hour presentation teaches you the basics of good nonprofit communication and helps you avoid the pitfalls and mistakes made by many organizations. Fee: \$45. Offered in partnership with with Jennie Winton & Zach Hochstadt, Mission-Minded.

Successful Project Management

April 15, 2008 | 9:30 am - 3:30 pm | Oakland

Do you have a special project underway or looming on the horizon, such as a fundraising event, an office move, the installation of a new system, or the launch of a new program? This workshop will provide an overview of successful project management and introduce tools and techniques you can use to plan, organize, and execute your project. We'll define the role of project manager and the key requirements for project planning, design, and implementation. Then, using some real-life examples, we will show you how to set up tasks, assignments, and timeframes; how to get people to help with your project; and introduce you to some tools to make project management easier. Come with a project management issue to work on! Fee: See Compasspoint's fee schedule. Offered in partnership with CompassPoint Nonprofit Services and Anushka Fernandopulle.

Reducing Overhead: The Do's & Don'ts of Sharing Space and Administration

April 17, 2008 | 9:00 am - 10:30 am | Oakland

Administrative cost-sharing and shared services can reduce nonprofit costs by offering purchasing power, flexibility and concentrated expertise. These cost savings can make your operations more sustainable and fund increased services or expansion. Explore strategies for funding and organizing Shared Services programs, their relationship to shared space, as well as pitfalls to avoid.

Through conferences, peer networking, and mentoring, **The NonprofitCenters Network** provides education and resources for the creation and operation of

quality nonprofit office and program space. The NonprofitCenters Network is operated through Tides Shared Spaces.

Speaking with Conviction

April 22, 2008 | 9:00 am - 4:30 pm | Oakland

For Executive Directors, Development Professionals & Fund Raisers, Board Members, Program Managers, Media Spokespersons, Key Volunteers, Citizen Activists, & Social Entrepreneurs

A one-day, interactive, unforgettable learning event to strengthen your persuasive speaking skills.

Meet the Grantmakers

April 30, 2008 | 10:00 am - Noon | East Contra Costa

The Foundation Center brings its popular Meet the Grantmaker series to East Contra Costa County for a close-up look at funding in the region. Panelists will describe their organizations' funding programs and guidelines as they pertain to the East Bay, as well as provide "insider tips" for making a compelling case for your funding request.

16 Criteria for an Excellent Needs Statement

May 8, 2008 | 9:30 am - Noon | Walnut Creek

Every fundraising solicitation includes a "statement of need," i.e. a description of the problem your non-profit is tackling and why a prospective donor should care. The quality of the needs statement can make the difference between your solicitation being taken seriously or put aside.

In this workshop, we will discuss sixteen criteria for an excellent needs statement, why they are sometimes difficult to write, and how to find the right balance between statistics and emotion. After hearing examples of good and not-so-good needs statements, participants will draft one (in pencil, by hand!), read it aloud, and get feedback from the instructor and other participants.

After completing the workshop, participants will have the knowledge and confidence to tackle writing a needs statement for a program, project, or organization suitable for a long-form foundation proposal, letter of inquiry, individual solicitation, or the proverbial "elevator presentation."

Raising Money with a Fundraising Houseparty

May 14, 2008 | 10:00 am - Noon | Hayward

This highly participatory workshop gives a complete deconstruction of the Fundraising Houseparty – a very powerful and flexible way to raise donations from individuals for noncommercial projects media both large and small. Topics covered include:

- What projects are appropriate for houseparties;
- Finding and preparing the Host;
- Who to invite;
- Timeline for and design of invitations;
- Program sequence for the formal presentation;
- What type of program clip to show;
- How to make the "ask" and who should do it;
- Follow-up activities.

Participants are encouraged to bring in samples of their own houseparty invitations and pledge cards (actual or proposed). All participants will receive a copy of *The Fundraising Houseparty: How to Party with a Purpose and Raise Money for your Cause – 2nd Edition*. For an audio clip about houseparties from Warshawski's appearance on Marketplace Radio, just go to his website: www.warshawski.com

Preparing for Your Audit

May 20, 2008 | 9:00 am - Noon | Oakland

This workshop will demystify the audit process from start to finish. We will examine the need for an audit, how to hire an audit firm, what to expect from your auditor, what your auditor expects from you, who will be involved, and how to live through it. Come on in, the water is fine!

Giving Circles & Donor Circles

April 24, 2008 | 8:30 am -10:00 am | Oakland

Five years ago, giving circles were under the radar. Two years ago, they were a trend just beginning to grow. Now a new report by the Forum for Regional Associations of Grantmakers finds that groups of people getting together and giving together are an established philanthropic force that has raised million to support diverse charitable causes.

Our guest speakers, both seasoned fundraising professionals, will discuss their own lessons learned in forming a giving circle, and participate in a conversation about using the giving circle approach to cultivate your agency's donors.

Dude: Are You Reaching Young People?

April 25, 2008 | Noon -1:30 pm | Walnut Creek

Are you recruiting, managing, serving and/or engaging with people in their teens and twenties? Join your peers to explore success stories and failed experiments in efforts to effectively engage and communicate with people born into the digital age, with a cell phone in one hand and an I-pod in the other. You should come away with some new ideas about ways to reach out and engage Millennials in the work of your organization, as staff members, board members and volunteers.

Peer Roundtables are regular meetings designed to encourage peer learning, foster peer support, and support community building among members of the East Bay nonprofit community.

Roundtables are structured informally as an alternative to workshops. Content is based on input from attendees, not on set curriculum. The format is conversational and ideas, comments, and questions are encouraged.

Visit our website for the latest schedule of roundtables.

www.cbocenter.org

A new program for executive directors seeking a confidential, supportive community of peers.

Peer Circles for Leaders provides a monthly venue for 5-7 executive directors to draw on each others' wisdom while exploring ideas, issues, challenges and solutions in a confidential, supportive atmosphere. You provide the content. We facilitate the process with a focus on deepening the learning and forwarding the action. This program is designed for busy executive directors who recognize the value of professional development and are challenged to find the time to participate in lengthier programs. You know who you are! This is not a substitute for comprehensive leadership development programs, and we encourage you to take advantage of those. Peer Circles for Leaders takes what many consider the most valuable part of those programs – peer coaching and learning – and makes it accessible and affordable for almost any executive director.

We are now taking applications for a Peer Circle for executive directors of agencies with budgets under \$1m. This Circle will begin in April.

Peer Circles for Leaders will serve executive directors best who have at least 6 months experience leading their organizations. The cost of the nine-session program is \$300.

Questions? Contact Leyna Bernstein, Director of Programs at (510) 835-1009. For more information or to download an application, visit www.cbocenter.org.

"Being an ED is very isolating. There are so many issues you can not always discuss with staff and/or board. The issues are complex and having the time and space to discuss, reflect and get feedback (when you want it) from your peers is invaluable."

"Month after month I was able to bring critical questions to my peers for support and advice. In each case I received valuable feedback/support that often was critical to the success of my organization."

The CBO Center gratefully acknowledges Chevron Corporation for its support of this program.

Consulting Services

- ❖ Board Retreat Design & Facilitation
- ❖ Board Recruitment, Training & Succession Planning
- ❖ Leadership Transition
- ❖ Short and Long-Range Planning

For more information on our consulting services, rates, and experience, please contact Leyna Bernstein our Director of Programs, at leyna@cbocenter.org or in the office (510) 835-1009.

Coaching

- ❖ Leadership Team Coaching

Leadership Team Coaching is designed for executive directors and their board chairs, or any other leadership dyads that exist in an organization. The intention of Leadership Team Coaching is to create an exciting, powerful, effective, and satisfying partnership. Create alignment around goals for the partnership, approaches to decision making, how conflict and disagreement can enrich the team's outcomes, the tone of the partnership, etc.

For more information on our coaching services, or to schedule a sample session, please contact Liz Callahan, executive director, at (925) 602-6760 or liz@cbocenter.org.

"Just wanted to update you about our hunt for a board development consultant. I'm in the process of hiring (one of your Affiliate Consultants). I think she'll be a good fit with our board and staff. Thank you so much for your help with this! This a great service you offer the CBO world."
Mark P. Batenburg
Executive Director
Youth Service California