

# Community Action Partnership

## Community Capacity Building Grant

### Training Schedule

### Grant Year 2007-2008

We are pleased to announce our “capacity” Training Schedule for this grant cycle. Community Action Partnership is contracting with the Volunteer Center of Sonoma County to assist in the planning and delivery of the board and organizational specific sessions.

Training topics listed in this schedule have been identified and created through the 2007-2008 RFP submissions and/or our organizational onsite assessments.

*All sessions are open to any organization who submitted an RFP for the 2007-2008 Capacity Building Grant regardless of the size of your organization or your funding result.* Seating is limited and will be reserved on a first come basis. Every workshop listed on this schedule is being offered at **NO CHARGE**.

**\*\*\*REGISTRATION IS REQUIRED TO ATTEND\*\*\***

**Sessions at Community Action Partnership**  
1300 North Dutton Avenue, Santa Rosa (Training Room)  
Contact: Teddie Pierce  
tpierce@capsonoma.org  
707 544-6911 x1017



**Sessions at the Volunteer Center of Sonoma County**  
153 Stony Circle, Ste 100 Santa Rosa  
Contact: Chris Cram  
[CCram@volunteernow.org](mailto:CCram@volunteernow.org)  
707 573-3399x 115



#### **Web Links:**

Current information about the 2007-2008 training sessions may be accessed from the capacity building link on the Community Action Partnership website at [http://www.capsonoma.org/CCBG/CCBG\\_nav.htm](http://www.capsonoma.org/CCBG/CCBG_nav.htm). The site will be operational on Friday June 20, 2008.

#### **Technical Assistance:**

If your organization could benefit from one-on-one technical assistance you may take advantage of that as well. Details about our T&A offerings can be discussed by calling our CCBG team at 707 544-6911 x1091.

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## **Determining Your “Audit Readiness”**

**July 10, 2008 – 9:00 am to 10:30 am**

**ID RD\_01**

**Location: Community Action Partnership**

In recent years, non-profit organizations have been subject to many new regulations. Between the California Non-Profit Integrity Act and the new auditing standards that became effective for most audits being performed this year, your non-profit organization may have new requirements or your financial statement audit may be performed differently. How prepared are you? Our presenter, Linda Kachiu from Zainer Rinehart Clarke, CPAs will review the current audit requirements and the changes in the approach to and comments on your financial statement audits.

*Trainer Linda Kachiu, CPA Zainer Rinehart Clarke* provides training and expertise in the tax exempt arena, which includes charitable institutions, trade associations, and private foundations. Linda is the lead director for the firm’s technology. Linda is active in local community organizations, such as the Sonoma County Economic Development Board and its related Foundation and the Sonoma County Food and Wine Center.

### **Topics List:**

- Assessing your audit readiness
- Do you know the requirements of the California Non-Profit Integrity Act?
- Changes in what auditors are required to do
- Do you know how the new auditing standards may impact your audit this year?

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## **Video Marketing Your Organization**

**July 17, 2008 – 9:00 am to 11:00 am**

**ID CE\_01**

**Location: Community Action Partnership**

With an increasingly tech savvy donor profile – video marketing could be on your horizon. You may want to find out what is involved in creating a video marketing piece for your website as well as a communication tool for donor appeals.

### **Trainer Jon Jones**

Jon Jones is the owner of Lunarparcel Media. As a specialist in the field of digital media, Jon devotes his efforts especially for the benefit and enrichment of families, non-profit organizations, and community building efforts.

### **Topics List:**

- Why share your message through media?
- Considerations for an effective presentation
- Feasibility
- Technical issues and cost of production

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## **Basic Web Design Featuring iWeb or DreamWeaver**

**July 24, 2008 – 9:00 am to 11:30 am**

**IT\_03**

**Location: Community Action Partnership**

If you will be creating or maintaining your organization's website this session will cover some tools you will need to understand the web design process. Note this session will focus MORE on use of the web editing software vs. web content. We are offering a separate content session on August 7, 2008.

**Trainer James Bleifus** - has taught Macs for over four years, and more specifically turned to coaching these past two. Previously, he was a Creative (Trainer) for Apple Computer. James has found a particular talent and satisfaction in assisting seniors and school teachers. Ever the serious student, he continuously follows new programs, updates, and products for the benefit of his clients, and is currently in the process of filming a video manual about Apple's iWeb program.

**Trainer Elena (Scotty) Baney** – Scotty serves as Community Action's IT Department Manager. She holds AS Computer Science from SRJC and BS Information Technology Management from Golden Gate University. Scotty is skilled in numerous database and web programming applications as well as computer operating systems. She provides IT consulting through the Technical Assistance area of the grant.

**Topics List:**

- Securing and hosting your domain, & other legal issues
- Pre-planning your site using site mapping or story boarding
- Webpage design elements & objects using iWeb or Dreamweaver
- Customizing the page themes
- Publishing the Website

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## **Basic Training for Board Members**

**July 29, 2008 – 5:30 pm to 8:30 pm**

**ID OD\_01**

**Location: Volunteer Center of Sonoma County**

Location: Classroom A, Volunteer Center of Sonoma County

This workshop, which is designed for both new and current board members, offers an overview of responsible board governance. Topics covered include: basic roles and responsibilities for board members, finance, fundraising, board development, community relations and marketing Join a group of your peers to learn how to be most effective in your role as a board member.

**Trainer Debra Schoenstein**, a Senior Partner with LeaderAlliance, has spent the last 30 years successfully managing and consulting on a wide variety of organizational performance improvement efforts both domestically and internationally in the private, nonprofit and government arenas. Deb has trained many boards through the Volunteer Center's Basic Training for Board Members.

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## **The eNonprofit: Effective Websites & Web 2.0**

**August 7, 2008 – 9:00 am to 12:00 pm**

**ID IT\_04**

**Location: Community Action Partnership**

What are the elements of an effective nonprofit website? In this workshop we'll look at those elements, with a focus on how websites support fundraising. You'll learn about the four key website attributes, tips on writing for the web, top ways to catch donors on your website, strategies for driving traffic to your site and evaluating your progress. We'll discuss the characteristics of a donor-friendly website and tips to improve your sites interactivity.

**Takeaways:**

- Five tips for writing on the web
- Examples of effective websites
- Interactivity tips and tricks

The Internet and Digital Media are bringing organizations to life in unique ways. From sharing stories about your work to engaging stakeholders in your mission, digital storytelling brings people closer to your organization while erasing boundaries of time and geography. We'll review exciting new Web 2.0 tools that engage people in your mission in ways never before possible. In this session you'll learn about online engagement tips and techniques including various exciting digital media approaches and examples from real life.

**Takeaways:**

- Online Engagement Essentials
- Digital Media Options
- Digital Storytelling Resources

***Trainer John Kenyon*** - is a nonprofit technology strategist who has been engaged with nonprofits for over 18 years providing advice, teaching seminars and writing articles about technology. Along with Michael Stein he wrote both *The eNonprofit: a guide to ASPs, internet services and online software* and the *Nonprofit Quarterly* article *A Decade of Online Fundraising*. He recently served as Training and Consulting Manager at [Groundspring.org/Network for Good](http://Groundspring.org/Network) before returning to private practice in 2005. John's practice concentrates on strategic uses of appropriate technologies with a focus on leveraging the internet. He is an adjunct professor at the University of San Francisco and has been a featured speaker at conferences and workshops across the US, England, Australia and online.

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**Recruit & Retain Your Dream Board****August 19, 2008 – 5:30 pm to 8:30 pm****ID OD\_02****Location: Volunteer Center of Sonoma County – Classroom A**

Where do you find savvy, dedicated people to govern your organization, and how do you develop them into effective board members? In this workshop, discover how to: analyze your board profile to determine your needs, move from nominating committees to development committees, develop a winning recruitment strategy, locate the best candidates, and develop an effective orientation for new board members.

***Trainer Diane Brown*** is a consultant and trainer with the Non-Profit Assistance Group of Sebastopol ([www.NonProfitAssistance.com](http://www.NonProfitAssistance.com)) and has over 25 year of experience helping boards and staff with board development, strategic planning, and fundraising. She is also an instructor in Nonprofit Management at Sonoma State University and the University of San Francisco.

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**Looking at VOIP Phone Technology****August 26, 2008 – 12:00 pm to 1:30 pm****ID IT\_05****Location: Community Action Partnership**

During our onsite assessment process we found many organizations who were seeking upgrades to their phone systems. We would like to introduce you to the functionality of “VOIP” or voice over

IP technology. A VOIP communication system provides your phone services over internet technology with a vast set of features like voice mail, caller seeking, conference calling, faxing and much more. AND you can “slash” your monthly phone charges.

This session will be presented by 2-3 VOIP system vendors showing their primary feature sets and comparable pricing.

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## **Assessing Your Organization & Preparing for Strategic Planning**

**September 10, 2008 – 9:00 am to 12:00 pm** OD\_03

**Location: Volunteer Center of Sonoma County – Classroom A**

In this hands-on workshop, we will utilize several business analysis tools, including completing a SWOT analysis to help with strategic planning, both short and long term. SWOT - strengths, weaknesses, opportunities and threats - is a focused way to look at your business or program. We'll also look to the 4A's structure of strategic planning: 1) Aim - what are the short and long term goals? 2) Assess - do you know what you need to know to complete the SWOT analysis? 3) Activate - are you using all your strengths to take advantage of identified opportunities? and 4) Apply - what are the action steps you need to make it all happen? All participants will leave with at least the beginning pieces of a strategic plan and a list of next steps to insure completion.

**This workshop will benefit organizations planning to submit an application for the 2008-2009 RFP!**

*Michele Rogers*, M.A., is the Executive Director of the Early Learning Institute, (ELI) a Community Based organization for young children and their families. Ms. Rogers has more than 10 years of experience designing strategic planning retreats and workshops.

- Spotighting data important data trends

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## **Spruce Up Your Marketing Collateral**

**November 6, 2008 – 9:00 am to 11:30 am** ID CE\_02

**Location: Community Action Partnership**

Are you looking to redesign and rebrand your brochures, business cards, flyers, website or other marketing pieces? Then this will be a great session for you to attend. Non-profits must compete in a cluttered world of advertising, and marketing images to communicate their message.

Design concepts and marketing venues that communicate your message, and reach new donors have changed dramatically. In this session we'll cover a variety of design and marketing tips that can help deliver your message.

*Trainer Bruce Hetteima* is principal of P&H Creative Group - a Santa Rosa based advertising agency. He has 20+ years of experience in design, marketing and art direction. He also serves on the board of the YMCA.

### **Topics List:**

- Defining your marketing message
- Use of logos and graphic elements
- Refining your message
- Grabbing the readers attention

- Explore marketing vehicles and opportunities

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## **Building & Sustaining Effective Coalitions**

**October 2, 2008 – 9:00 am to 12:00 pm**

**ID OD\_05**

**Location: Volunteer Center of Sonoma County – Classroom A**

This hands-on workshop is designed to help you strengthen the effectiveness of your current collaborative efforts and to help you implement tools for growing functional, sustainable, outcome-oriented coalitions.

We will address: identifying characteristics of a functional, sustainable outcome-oriented collaborative effort; how to assess your project; taking your coalition from start-up or stall-out to a strong and sustainable results-oriented group; tips for dealing with breakdowns, politics and conflict; and developing your coalition for the long haul. Please bring your specific needs, challenges, visions and desires related to coalitions and collaborative efforts.

*Trainer Pat Landrum*, MA, CCC has been facilitating collaborative efforts in business, healthcare, non-profit, government and community sectors for 30 years. She is the Executive Director of The Healthy Community Consortium in Petaluma.

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## **Leading Together as a Partnership: Strengthening the Board/Executive Director/Staff Working Relationship**

**October 16, 2008 – 9:00 am to 12:00 pm**

**ID OD\_06**

**Location: Volunteer Center of Sonoma County – Classroom A**

Leading as partnership and enhancing nonprofit governance and management means understanding and exercising complementary roles with clear boundaries as well as mutually agreed upon decision-making authority and lines of communication. This interactive workshop focuses on both a conceptual understanding and practical tools covering the following: strengthening understanding of board and executive director responsibilities; clarifying boundaries of responsibility and decision-making of board committees and staff members; enhancing lines of communication with the board and executive director; and sharing lessons learned and helpful approaches for strengthening the partnership of board and staff.

*Trainer Christopher Szecsey* has over 35 years experience as a local and international consultant, trainer, and facilitator, and has designed and conducted numerous training workshops on topics such as: board development, leadership, strategic planning, organizational learning, program development and evaluation, and Appreciative Inquiry applications. He has been a non-profit executive director and has served on three boards, and now is the board chair of a local nonprofit.

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## **Create & Present Easily Understood Financial Information for Boards**

**November 6, 2008 – 9:00 am to 11:30 pm**

**ID RD\_02**

**Location: Community Action Partnership**

This session will explore different methods for redesigning or reformatting your agency financial data so your important financial knowledge can be more easily digested and understood. This session is targeted to your executive and/or accounting and office management staff.

**Trainer Meridith Cionci, CPA Zainer Rinehart Clarke** a CPA licensed in California, and has been practicing in public accounting for over ten years. She is a director/shareholder of Zainer Rinehart Clarke, CPA's, with management responsibilities for the firm's auditing and accounting and quality control practices. Her dynamic background varies from offering interim controller support and internal control evaluations for business clients, to in-depth financial and tax analysis for individuals.

Meredith is a member of various professional organizations, such as the American Institute of CPAs, California Society of CPAs, and Santa Rosa Chamber of Commerce – Young Professionals Network. She has also authored articles in highly regarded accounting publications and given presentations on a variety of accounting topics in the community. Meredith is a native of Sonoma County and an active member in the community, serving on the Finance Committee and Board of Directors of the Extended Childcare Coalition, Inc. and on the Board of Directors for the Golden State Land Conservancy.

**Topics List:**

- Assess the effectiveness of your current reporting
- Know the right amount of financial information to present
- Target your financial reports to the correct reader
- Understanding financial reporting requirements

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## **Spruce Up Your Marketing Collateral**

**November 12, 2008 – 9:00 am to 11:30 am**

**ID CE\_02**

**Location: Community Action Partnership**

Are you looking to redesign and rebrand your brochures, business cards, flyers, website or other marketing pieces? Then this will be a great session for you to attend. Competitive messaging is a must in the cluttered world of advertising, and marketing images.

Design concepts and marketing venues that communicate your message, and reach new donors have changed dramatically! In this session we'll cover a variety of design and marketing tips that can help deliver your compelling marketing story.

Bring examples of your organizational brochures or cards get some “hands on” improvement ideas!

**Trainer Bruce Hetteema** is principal of P&H Creative Group - a Santa Rosa based advertising agency. He has 20+ years of experience in design, marketing and art direction. Preview the website for P&H to see the vast amount of marketing and advertising services they have experience with at <http://phcreative.com/services.html>. Bruce also serves on the board of the YMCA.

**Topics List:**

- Defining your marketing message
- Use of logos and graphic elements
- Refining your message

- Grabbing the readers attention

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## **Engaging Your Board in Financial Analysis**

**November 19, 2008 – 9:00 am to 12:00 pm**

**ID RD\_03**

**Location: Community Action Partnership**

Our final session for this grant cycle will be targeted to your board members. Presentation of financial statements can be challenging for your board if they don't understand how to interpret them. Our presenters will teach your board how to review basic financial statements and feel confident about their grasp. If you or your staff attended the session on designing your financial statements - this session will dovetail that earlier training.

*Trainer Linda Kachiu, CPA Zainer, Rinehart Clarke* provides training and expertise in the tax exempt arena, which includes charitable institutions, trade associations, and private foundations. Linda is the lead director for the firm's technology. Linda is active in local community organizations, such as the Sonoma County Economic Development Board and its related Foundation and the Sonoma County Food and Wine Center.

### **Topics List:**

- Financial Statement Tools
- Identification of emerging trends
- How to ask in-depth questions for better understanding