

Capacity Building Workshops, Part One

Wednesday, September 16

1:00 – 2:30 p.m.

Workshop Title	Course Description	Course Instructor/Facilitator
1A: Strategic Planning vs. Positioning - Which is most appropriate for your organization?	Most organizations understand strategic planning and recognize the value of a solid plan. However, for organizations ready to go to their next level, we suggest a strategic positioning process. Strategic positioning is a systematic, analytical process to define an organization's identity and niche. It is the overlap between planning and marketing and more fully recognizes the external environment and the organization's audience. Participants will be introduced to positioning as a tool to build a more potent and sustainable organization and to have more influence within their niche. Tools, templates and resources will be provided for immediate application. At the end of this session, participants will be able to: 1) Articulate the positioning process and define their organization's position within the context of their community and competition; 2) Use positioning to define niche, brand, and image; 3) Understand strategies to fully occupy a distinct niche and create a positioning plan to dramatically increase the organization's presence and support.	Shelli Bischoff , Conservation Impact
1B: Mission and Branding - Creating an Effective Marketing and Branding Plan and Elevator Speech	The focus of this session will be the components of an effective marketing and branding plan. Attendees will also develop their own elevator speech and practice with each other. Nonprofit Board members are encouraged to attend this session with their staff.	Betsey Jay , Yampa Valley Community Foundation.
1C: Advanced Financial Management	This session is for participants who are looking to take their organizations to a more advanced and sophisticated level of financial management. The session is targeted to individuals with moderate level of understanding of nonprofit financial management, and will be appropriate for executive directors, nonprofit finance staff, and board leadership.	Susan Steele , Temple Hoyne Buell Foundation; Julie Lerudis , Boettcher Foundation
1D: Weathering the Storm - Fundraising	Even in challenging times, there are both opportunities and attitudes that ensure	Sarah Fischler , Community Resource Center

in Challenging Times

fundraising success. This training will help your organization look critically at current funding streams, identify gaps and opportunities for diversification, and provide information and resources on essential and emerging strategies for fundraising success to help your organization survive and perhaps emerge even stronger. Each participant will receive a comprehensive toolkit that contains practical information, tools, and resources to help you immediately implement what you learn within your organization. This class is based on data gathered through the [Weathering the Storm](#) project, a collaborative initiative between the Community Resource Center and the Colorado Nonprofit Association.

1E: What Funders are Looking for with the New Colorado Common Grant Application and Report

Gain insight into Colorado's new Common Grant Application (CGA) and Common Grant Report (CGR). We will cover the significant changes made to these tools by the recent revision efforts and offer insight into funders' perspectives related to grant writing and grant reporting. We will also strive to cover any topics related to the CGA and CGR that participants have concerns about. Both presenters played key leadership roles in the efforts to revise Colorado's CGA and CGR.

[Michelle Sturm](#), Anschutz Family Foundation; [Lauren Price](#), Community Resource Center

1F: Engaging Board Members in Fundraising - Expanding the Organizational Donor Base

Board members are uniquely positioned to be your organization's best fundraisers, once they know why they're asking, what they're asking for and how to ask. This very interactive session will help you identify the best ways to deepen your board's engagement in fund development. You'll learn specific methods for coaching your organization's volunteer leadership in reaching out to new constituencies and for promoting mutual accountability. This is a great session for board chairs to attend!

[Dr. Martha Vail](#)

1G: ASPIRE 101 - Using Statistics to Match Services with Needs

This session will introduce you to ASPIRE, a web-based data system designed to store and manage indicator and resource data that can be queried to meet the user's needs. ASPIRE contains indicator data within numerous domains such as demographics, early care and education, community and civic involvement, mental health, and substance abuse and treatment. There are many potential uses and useful features to the data system. The system

[Misty Schulze](#), OMNI Institute

is designed to enhance data understanding and support community assessment work.

Capacity Building Workshops, Part Two

Wednesday, September 16

2:45 – 4:15 p.m.

Workshop Title	Course Description	Course Instructor/Facilitator
2A: Planning and Preparation for Capital Campaigns	This workshop is designed to help small and large nonprofits contemplating a capital project and/or campaign learn to plan earlier and better, thus avoiding many costly and all too common mistakes. The facilitator will review key steps in planning and conducting a capital project and will cover critical questions every nonprofit should ask before moving forward.	Lisa Flores , Gates Family Foundation
2B: Nonprofit Survival Guide	Building on the vibrancy and value of the nonprofit sector, the session will analyze the current economic situation and explore avenues for nonprofits to not only survive but also thrive by engaging staff, board and volunteers to help advance missions. By offering practical examples and ideas, this session will cover outreach, communications, strategic collaboration and approaches to invigorate boards to become active ambassadors.	Jeff Pryor , Anschutz Family Foundation
2C: Planned Giving Program in One Hour a Week	You've heard about planned giving, and you know that it can be an important source of gifts. Maybe you've put "Start a Planned Giving Program" on your 2009 "to do" list. But where do you start? What do you need to know about the many different gift planning strategies? What are the best places to invest your precious time for planned giving success? At this presentation, you will learn why Planned Giving is worth your time; how to explain Planned Giving to your senior staff and board and get their buy-in; which of your donors are the best Planned Giving prospects; what you need to know (and not much more!) about the many Planned Giving vehicles; the TOP TEN things to do to get a Planned Giving program started.	Dan Harris , Wells Fargo Bank Charitable Management Group
2D: Weathering the Storm - Financial Management in Challenging Times	Organizations with strong financial management practices will be better positioned to withstand tough times and make effective strategic, operational, and programmatic decisions. This	Sharon Knight , Colorado Nonprofit Association

training will give your organization an overview of the most critical things you need to know, and do, during a recession to keep your organization financially viable, operating transparently, and serving constituents and shareholders accountably! Each participant will receive a comprehensive toolkit that contains practical information, tools, and resources to help you immediately implement what you learn within your organization. This class is based on data gathered through the [Weathering the Storm](#) project, a collaborative initiative between the Community Resource Center and the Colorado Nonprofit Association.

2E: Working with the Logic Model (Under Duress or Desire) and Retaining a Sense of Humor

This session will help participants develop an understanding of the logic model; participants will learn how a logic model can monitor progress, expose assumptions, restrain over-promising, promote communication and serve as an evaluation framework. The interactive session will give participants hands-on experience and renewed confidence regarding strategic planning and evaluation.

[Misty Schulze](#), OMNI Institute

2F: Legal Requirements and Ethical Issues for Nonprofits

Legal and ethical compliance is an essential best practice for nonprofit organizations, especially during difficult times when competition for funding and donor scrutiny increases. To help your organization ensure that it is effective in these areas, this session will cover topics including transparency, conflicts of interest, fiduciary responsibility for directors and officers, duties of nonprofit board members, legal and ethical issues around financial management, and risk management. Additionally, this session will include practical tips on implementing these ideas through policies and integrating this thinking into your organizational culture.

[Sara Craig-Scheckman](#), Craig-Scheckman Foundation

2G: Social Media for Nonprofit Organizations

Social media can help your organization engage more constituents, raise more money, or bring your mission to new audiences. Don't know where to start? Come to this session to learn about the basics about major social media tools available to nonprofit organizations, how to decide if your organization should use them, how to get started, and how to measure return on investment related to social media. The session will also include visits to social media sites (Facebook, Twitter, and others), plus a look at how some organizations have successfully used social media tools.

[Lauren Price](#), Community Resource Center

Capacity Building Workshops, Part Three
Thursday, September 17
8:45 – 10:00 a.m.

Workshop Title	Course Description	Course Instructor/Facilitator
3A: Networking for Success in a Changing World	Networking can be more than just swapping business cards. Instead, it is thoughtfully building mutually beneficial relationships and creating an invisible web of entrusted seamless connections. In this interactive session we will explore some tools for improving your social network, including how you can create effective personal and professional networks that are broad enough, diverse enough, yet focused enough to meet your objectives; developing a strategy for networking; tapping the hidden potential of your social networks; and effectively using the internet to grow your network. Everything we do is a result of interdependencies. Intentional social networking can improve your likelihood of success.	Elaine Brett , EMB Associates
3B: Advancing Leadership Through Relationship Building - Executive Director Reviews and Board Self-Assessment Strategies	In this workshop, you will hear from two experts in board development and executive director performance measurement. You will be given specific tools that will guide your board of directors in measuring the effectiveness of your executive director, and the effectiveness of the board of directors. The results will be a clear indication of the steps that will lead to a highly successful organization.	Mark Andersen and Alexandra Mitchell
3C: Federal Funding - Resources, Access, Use, and Reporting	With a decline in giving, your organization may now be considering the potential for Federal grant funds. If you are interested in preparing your organization both for the immediate and long-term opportunities from Federal funds this is the workshop for you. This workshop will equip you with your federal grants tool box. The Federal review process has always been very competitive. This session will introduce your organization to the resources available, explain ways to access funding, and discuss use and reporting issues nonprofits	Amy Humble , Colorado Nonprofit Association

face when receiving federal funds.

3D: Basic Financial Management

A strong nonprofit organization must have a clear representation of their financial status, at a given point in time, as well as over the course of a year, or longer. The presenter will demonstrate how to prepare and read various financial statements, including Profit and Loss, Balance Sheet, and Cash Flow Statement, as well as IRS Forms 990s and Annual Audits. You will also learn how to involve your board of directors in reviewing and managing these financial statements.

[Megan Ledin](#), Grand Foundation

3E: Philanthropy Online -Why mad moms, HelloHealth, and a video about putting things in a blender will change the way you connect with volunteers, donors and members

This presentation will address three major shifts in online and social tools that can help you develop deeper relationships with your current donors and volunteers, cut through the noise, and run a better organization.

[Jay O'Hare](#), Altera Performance Group

3F: Stop the Presses! Working with the Media to Promote Your Mission

In this session, you'll get advice from the inside! Scott Stanford will share what it takes to get the media's attention and how to develop an ongoing relationship with local media. He will also discuss advertising strategies: how to target your marketing to reach your audience. Riley Polumbus will discuss best practices for successful marketing, including online marketing strategies and public relations. In addition, she will give examples of the tools being used by Yampa Valley Medical Center to communicate its services and mission. She will also discuss tips to help you reach your audience and work with the media to tell your story.

[Scott Stanford](#), Steamboat Pilot and Today; [Riley Polumbus](#), Yampa Valley Medical Center

3G: Advanced Strategies for Capital Project Success - Engaging Funders, Government and Nonprofits with Specific Capital Campaign Projects (Panel Discussion)

If your organization is engaged in a capital campaign or capital project, or ready to launch, this session is for you! This session will include the opportunity to interact with capital funders from foundations, local government, and a federal agency to discuss your challenges, strategies, questions, and ideas. Topics will be generated by participants.

[Sally Rippey](#), Adolph Coors Foundation; [Katie Kramer](#), Boettcher Foundation; [Lisa Flores](#), Gates Family Foundation. Other panelists to be announced.

Capacity Building Workshops, Part Four

Thursday, September 17

10:15 – 11:45 a.m.

Workshop Title	Course Description	Course Instructor/Facilitator
4A: Sharing Program and Administrative Resources - Creative Ways to Share Staff, Facilities, Supplies	<p>PART A: Rural areas have a strong sense of community responsibility and propensity toward collaboration. As a result, they are adept at devising unique and creative ways to build social and physical infrastructures needed to provide the services that urban areas take for granted. Working collaboratively with community organizations, where they exist, has been essential to the success of Aging Well. Come discuss how collaboration and community investment can create replicable, sustainable and economically supportable programs to improve the lives of the people you serve.</p> <p>PART B: Funders and Nonprofits will present several examples of best practices where agencies realized greater impact and efficiency through shared resources.</p>	<p>Dace Carver Kramer, Director of Wellness and Aging Services, Aging Well; Community Resource Center Staff; Randy Rudasics, Colorado Mountain College; Lori Mueller, YouthZone; Jennie Miller, Energy Outreach Colorado.</p>
4B: Developing and Maintaining Effective Collaborations	<p>The Ultimate Collaboration! In PART A you will: understand the key steps to setting up a collaborative what will prevent conflict and keep everyone around the table; learn about the pragmatic issues you need to address to make any collaborative run smoothly; consider/discuss/present potential interventions based on what you have found to be dysfunctional in an existing collaborative group; and, develop a list of next steps in either getting your current collaborative in line or setting up your next collaborative effort. PART B: Funders and Nonprofits will present several examples of best practices where agencies realized greater impact and efficiency through collaborations.</p>	<p>Maro Zagoras, Desired Outcomes Inc.; Ed Lucero, The Colorado Trust; Dana Duran, Boys and Girls Club of Craig; Diane Miller, Northwest Colorado Visiting Nurse Association;</p>
4C: Developing and Maintaining an Effective Constituent Database	<p>Is your nonprofit ready to take the next step and move from Excel to a Donor Management System? Learn how to find the right system, prepare your data, and get set up for success. The presentation will include a brief overview of GiftWorks</p>	<p>Patrice "TC" Werner, A Good Quest</p>

[Fundraising Software](#) from Mission Research. GiftWorks is an inexpensive, yet powerful, program that can track donors and volunteers, and it links to QuickBooks. We'll cover the key questions to ask when researching donor management systems, important fundraising terminology, and how to prepare your data for your new system.

4D: How to Affect Policy Making - Local, State and Federal

Are government regulations and policies hurting your ability to achieve your mission? Perhaps it is time to change them rather than fight them. Learn various methods and considerations for how to have policy work for your organization rather than against your work. Panel includes representatives from organizations who have successfully changed policy from the local grassroots level and up.

[Mary Brown](#), InterMountain Corporate Affairs; [Sue Birch](#), Northwest Colorado Visiting Nurse Association; [Dervla Lacy](#), Grand Futures Prevention Coalition

4E: Engaging Local and State Legislators

PART A: So many ways, so little time! Write, call, visit. Develop key messages and fact sheets. Learn the process for legislation, when you can be most effective, and ways to build the relationship and a reputation for competence, reliability and integrity. Panelists will also touch on some of the legal issues around lobbying as a nonprofit. **PART B:** Funders and nonprofits will present several examples of best practices where local and/or state legislators were engaged in the organization on a functional and long-term level.

[Tami Havener](#), Discovery Learning Center; [Lorez Meinhold](#), Colorado Health Foundation; [Al White](#), Senator, District 8; [Cari Hermacinski](#), City Council Member, City of Steamboat Springs

4F: GRANTMAKERS - Crash Course on Regional Issues and Assets

Funders, please join in this informative and interactive opportunity to learn more specifics about the five Northwest Colorado Counties. A panel of representatives from Grand, Jackson, Moffat, Rio Blanco and Routt Counties will give you the inside scoop on how this region works, some big ideas that are happening and answer any questions you may have.

Nonprofit and government representatives from the five counties of the Northwest region

Dine Around Discussion Dinners

Thursday, September 17

6:30 – 8:00 p.m.

These fun dinners are a casual and relaxing way to learn more about a topic and connect with others who are professionally or personally interested in a specific focus area. The meals will be hosted at nonprofit facilities around the Steamboat Springs area and feature a gourmet dinner prepared by local caterers and restaurants. The format will range from mission-based discussions to informal conversations to educational presentations.

Below is the topic list for the Dine-Arounds. Due to space limits in each facility, some specific dinners may be sold out by the time you go to sign up -- so register early!

- Historic Preservation
- Gardening in a Mountain Climate
- Faith-Based Organizations as Community Partners
- Emerging Fundraising Strategies
- Nonprofit Vitality: The Importance of Nonprofits in Maintaining the Community Workforce
- Early Childhood: A Discussion of Efforts/Possibilities Throughout the Region
- Animal Welfare
- The Yampa River: The Last Wild Waters of the Northwest
- No Child Left Inside: Great Ideas for Engaging Youth in the Outdoors
- Schools as Community Partners
- Arts, Culture and Youth
- Aging Well: New Ideas in Maintaining Quality of Life as We Age
- Northwest Colorado Products: The Expanding Culture of Buying, Eating and Using Locally Grown, Raised and Produced Products
- Elbow Grease: Engaging Volunteers in Meaningful Activities
- Greening Your Organization: From the Water Cooler to Your Next Capital Campaign
- Steamboat Orchestra Rehearsal