



Nonprofit Management Certificate Program 2023 (36 contact hours)

Virtual Open House

Area Foundation Staff

Friday, 3/31, 11 a.m. to noon

Long Game Leadership – Taking on Supersized Issues through Inclusion, Influence, and Adaptability

(The Adaptive Leader) – Francisco Gonima, Certified Professional Coach and Social Sector Strategist

Wednesday, 4/12, 9 a.m. to noon

Organizational Health and Strategic Planning

Shaun Lee, Vice President of Organizational Solutions, Mission Matters Group

Thursday, 4/13 from 9 a.m. to noon

Elements of Successful Nonprofit Program Development

Anthony Betori, Director Curriculum and Instruction, Healthy Futures of Texas and Bloomberg Fellow in Adolescent Health, Johns Hopkins University

Wednesday, 4/19, 9 a.m. to noon

Engaging, Managing, and Retaining Volunteers Through Client-Focused Engagement

Kathy McCleskey, Principal, PKM Consulting and Training Connection

Thursday, 4/20, 9 a.m. to noon

Diversity, Equity and Inclusion for Nonprofits: An Introduction to Inclusive Philanthropy, Parts I and II

Dr. Dorian Williams, San Antonio Area Foundation

Wednesday, 4/26 and Thursday, 4/27, 9 a.m. to noon

Budget Basics for Nonprofit Organizations

Chris Carmona, CPA, Founding Partner, Schriver, Carmona and Company

Thursday, 5/4 from 9 a.m. to noon

Financial Statements of Nonprofit Organizations and Key Financial Metrics

Chris Carmona, CPA, Founding Partner, Schriver, Carmona and Company

Friday, 5/5 from 9 a.m. to noon

Effective Board Governance

Jennifer Moriarty, President and Founder, Moriarty Consulting Group

Wednesday, 5/10 from 9 a.m. to noon

Conflict Management

Dr. Kathryn Keeton, Founder and Principal, Minerva Work Solutions

Thursday, 5/11 from 9 a.m. to noon

Making the “Big Ask”

Lisa Brunsvold, Vice President of Development, San Antonio Area Foundation

Wednesday, 5/17 from 9 a.m. to noon

Let’s Get Social: Creating Social Media Content that “Wows” and Builds Your Reputation

Jade Tate, Founder, Light Communications Group

Thursday, 5/18 from 9 a.m. to noon

Reflection and Lessons Learned: Post-Program Discussion

Area Foundation Staff

Thursday, 8/10 from 9 a.m. to 10:30 a.m.

SAN ANTONIO AREA FOUNDATION NONPROFIT MANAGEMENT CERTIFICATE PROGRAM 2023

Virtual Open House - Area Foundation Staff

Join the Learning and Development Team to learn more about the Nonprofit Management Certificate Program and how to use our new Learning Management System and Community Board. At this Virtual Open House, you will:

- Learn how to use the Learning Management System and Community Board
- Meet your fellow participants and Area Foundation staff
- Understand the program logistics – meeting dates and times, Zoom format and more

Who should attend: Nonprofit Management Program participants

Date/Time: Friday, March 31, 11 a.m. to noon

Location: Virtual

Long Game Leadership – Taking on Supersized Issues through Inclusion, Influence, and Adaptability - Francisco Gónima

The issues of our times are large, complex, and interdependent. No one agency, and no one leader, can go it alone and succeed. Today's relevant leader is expected to be as effective at collective impact and coalition building outside of their agency as they are at excellent management inside of it. So what does it take to be an 'adaptive leader', taking on complex issues in our community without getting overwhelmed? This course will introduce a framework built on inclusion, influence, big visions and healthy boundaries that are critical to the success of transformative leaders. You will:

- Understand technical vs. adaptive challenges, and the type of problem solving each requires
- Distinguish between 'hard' and 'soft' power and which is most valuable for leaders
- Identify your spheres of influence, and how to scale your ability to mobilize support
- Learn what it takes to recruit and retain coalitions in tackling complex problems
- Create a personal action plan to scale your community relationships and impact

Who should attend: Nonprofit Management Program participants, CEOs, executives, senior managers and those in community liaison roles as well as those who engage in cross-sector issues/collaborations those who need to evolve from internal managers to community impact leaders and those who want to cultivate their networks of influence

Date/Time: Wednesday, April 12 from 9 a.m. to noon

Location: Virtual

Organizational Health and Strategic Planning – Shaun Lee

An organizational operating system is the set of practices and tools that your mission, vision and strategy run on. The system runs at all times and manages how the organization functions – from how the team interacts, to how work gets done, how leaders are developed and how decisions are made. In this session, you'll learn about an organizational operating system designed for mission-driven teams with 6 levers that serves as a strategic planning and implementation tool. In this model, strategic planning and implementation are a core part of the way your organization operates and not something only done every 3 to 5 years. In this session, you will:

- Understand the characteristics of a healthy organization
- Learn about an operating system for mission-driven teams and why it's important to develop one for your agency
- Understand six key levers of organizational health
- Leave with actionable tools you can use to improve organizational health

Who Should Attend: Nonprofit Management Program participants and nonprofit leaders, at all levels

Date/Time: Thursday, 4/13 from 9 a.m. to noon

Location: Virtual

Elements of Successful Nonprofit Program Development – Anthony Betori

Developing a nonprofit program requires skill, expertise, and confidence in a wide range of competencies. Good program managers can effectively supervise staff, develop strong budgets, engage community members, evaluate their success, and so much more. Does this seem daunting, confusing, exhausting – or maybe even exciting? This highly interactive course will provide opportunities to learn and practice new skills in program development. Participants will receive a curated list of resources to use for career-long success in program development. You will learn to:

- Understand the components of effective program development -- planning, executing, and evaluating programs
- Identify resources available to support consistent professional development in program development skills.

Who should attend: Nonprofit Management Program participants, executives and management staff who have program development responsibilities, and entry-level staff interested in progressing their career to include these responsibilities

Date/Time: Wednesday, 4/19 from 9 a.m. to noon

Location: Virtual

Engaging, Managing, and Retaining Volunteers Through Client-Focused Engagement

Volunteers help to augment paid staff efforts with mission completion. Yet, managing and retaining volunteers is more than a “Ya’ll Come” proposition. When engaging volunteers, you must consider what skills your organization needs in order to complete its mission. Volunteer engagement should be client-focused, not organization-focused. Participants in this session will explore the basics of a well-run volunteer program and will learn how a well-run program ties directly to volunteer retention. In this class, you will learn to:

- Develop volunteer engagement opportunities that are mission-focused
- Create tasks that will attract volunteers
- Understand the importance of skill-based engagement
- Construct an attention-grabbing message
- Support and retain your volunteers

Who should attend: Nonprofit Management Program participants, program managers who engage volunteers and managers of volunteer programs

Date/Time: Thursday, April 20 from 9 a.m. to noon

Location: Virtual

Diversity, Equity and Inclusion for Nonprofits: Introduction to Inclusive Philanthropy, Part I – Dr. Dorian Williams

Rapidly shifting demographics, globalization, and greater social awareness regarding diversity, equity, and inclusion have compelled nonprofit organizations to embrace a more diverse and equitable workplace culture. No longer are the terms diversity, equity, and inclusion only associated with an organization’s crisis response, but with the way they do business day-in and day-out. This two-part course will help equip both yourself and your organization to embrace the power of human diversity and to learn how to integrate DEI into your practices, policies, and programming. Participants will:

- Understand foundational DEI terminology, theory, concepts, strategies, and their impact on nonprofits and the nonprofit community
- Identify the DEI standards of expectation and best practices as defined both DEI and nonprofit industry leaders
- Evaluate current DEI trends and data as they pertain to the philanthropic community.
- Understand and be able to articulate a clear link between DEI and organizational performance

Who should attend: Nonprofit Management Program participants and any nonprofit employee, leader, board member, stakeholder, or anyone who contributes to the success of the organization and/or who has a desire to build their understanding of DEI and how it affects nonprofits.

Date/Time: Wednesday, April 26 from 9 a.m. to noon

Location: Virtual

Note: Part 1 of this session is a prerequisite to enroll in the Part 2 session.

Diversity, Equity and Inclusion for Nonprofits: Inclusive Philanthropy in Practice, Part 2 – Dr. Dorian Williams

This two-part course will help equip you and your organization to embrace the power of human diversity and to learn how to integrate DEI into your organization's practices, policies, and programming. Part 2 will build on the DEI theory and concepts covered in Part 1 of this course, with an emphasis on practice and exercises. Participants will:

- Using the Meyer Tool, conduct a high-level DEI needs assessment and how to analyze the results against current DEI policies and processes
- Evaluate selected organizations' programming, website, and other forms of digital media for exclusive and inclusive language, ADA accommodation, and representation
- Review and comprehend two instructor led case-scenarios framed around varying levels and types of inequity

Who should attend: Nonprofit Management Program participants and any nonprofit employee, leader, board member, stakeholder who has a desire to build their understanding of DEI and how it affects nonprofits. Must have attended Part 1.

Date/Time: Thursday, April 27 from 9 a.m. to noon

Location: Virtual

Budget Basics for Nonprofit Organizations – Chris Carmona, CPA

An annual budget is a planning tool that helps nonprofit organizations develop short-term financial plans to reflect and reach long-term financial goals related to the organization's programs, mission and strategic plan. This course will provide basic steps in developing, implementing, and executing an effective budgeting process for your nonprofit organization. In this interactive and introductory-level class, you will learn:

- What a budget is and why budgeting is important to a nonprofit organization
- How to create an effective budget
- How to use your budget as a tool

Who should attend: Nonprofit Management Program participants, board members, Finance Committee members and nonprofit accounting or finance and program staff who assist in preparing financial statements for the CEO and the board

Date/Time: Thursday, 5/4 from 9 a.m. to noon

Location: Virtual

Financial Statements of Nonprofit Organizations and Key Financial Metrics – Chris Carmona, CPA

Financial management for nonprofit organizations is becoming more important due to growing donor sophistication and access to information, increased competition, and increased reliability of financial data for executives and board members to make key decisions. This course will provide a basic overview of financial statements and key financial metrics applicable to nonprofit organizations that can be used to assess financial health. You will learn to:

- Understand the basic financial statements of nonprofit organizations
- Using financial ratios and metrics to assess financial health of your organizations
- Key financial concepts applicable to nonprofit organizations

Who should attend: Nonprofit Management Program participants, board members, Finance Committee members and nonprofit accounting or finance and program staff who assist in preparing financial statements for the CEO and the board

Date/Time: Friday, May 5 from 9 a.m. to noon

Location: Virtual

Effective Board Governance – Jennifer Moriarty

Nonprofit management and governance can be both rewarding and daunting. At the crux of the experience lies the ability to understand board roles and responsibilities in an often-changing environment. Boards should not be static. To be effective, they must change and evolve as their organizations change and grow. In this session, we will explore different and distinct types of nonprofit boards through the lens of the nonprofit's board's lifecycle with specific emphasis on the board's transitioning role. You will learn:

- How a board transitions from organizing/founder members to a governing board
- What it means to become an institutional board
- To identify and understand board and staff experiences along each of the stages in the nonprofit board's lifecycle and best practices in governing in each

Who should attend: Nonprofit Management Program participants, board members, nonprofit staff and volunteers and those interested in learning more about board governance

Date/Time: Wednesday, May 10 from 9 a.m. to noon

Location: Virtual

Conflict Management – Dr. Kathryn Keeton

Though teamwork and group collaboration can be the most rewarding aspect of our work, it can also be the source of stress, conflictual interactions, and poor work outcomes both individually and organizationally if not addressed effectively. This interactive course will raise your awareness of your own approach to conflict, introduce an evidence-based methodology and strategy to effectively navigate contentious and conflictual situations and interactions, and improve your conflict management skills. This class incorporates both evidence based-theory and skills practice, using the research and theory of conflict and conflict management to improve real world effectiveness. You will learn to:

- Describe both the benefits and detriments of conflict
- Identify behaviors that escalate or de-escalate conflict
- Identify factors contributing to conflict or challenging conversations (from your perspective and the other party's)
- Practice basic question techniques to check your conflict diagnosis
- Recognize the effect of conflict styles and strategically select the best approach for a given situation

Who should attend: Nonprofit Management Program participants and anyone seeking to better understand workplace conflicts and how to resolve them

Date/Time: Thursday, May 11 from 9 a.m. to noon

Location: Virtual

Making the “Big Ask” – Lisa Brunsvold

How do you know the right time to make the “big ask”? How do you engage prospective donors in conversations about philanthropy? Taught by a fundraiser with extensive experience, this interactive course is designed to help improve your face-to-face solicitation skills. The session will help boost your annual fund and major gift program while building your confidence in engaging prospective donors. You will learn:

- How to engage prospective donors in conversations about giving
- How you can develop solicitation strategies for leadership and major gifts

Who should attend: Nonprofit Management Program participants, fundraisers, development officers and those whose role includes donor solicitation or those interested in building their skills in “making the ask”

Date/Time: Wednesday, May 17 from 9 a.m. to noon

Location: Virtual

Let's Get Social: Creating Social Media Content that "Wows" and Builds Your Reputation – Jade Tate

In this class, you will learn how to strategically share your organization's story and impact on social media. From audience identification to practical implementation skills, we'll cover how to bring your story to life on the social media platform(s) that expands your reach through storytelling. Creating content that 'wows' and building your reputation in ways that generate supporters and donors. Participants will:

- Understand the current landscape on social media platforms in order to create strategic content plans
- Understand the importance of strategic content creation and how to implement it within a team

Who should attend: Nonprofit Management Program participants and those responsible for communications within an organization *or* those who manage communications managers (to understand the importance of communications via social media and the process)

Date/Time: Thursday, May 18 from 9 a.m. to noon

Location: Virtual

Follow-Up and Reflection – San Antonio Area Foundation Learning & Development Team

In this session, open exclusively to those who enrolled in the Spring Nonprofit Management Program, participants will reflect on and discuss theory, concepts and practices learned during the program. Participants will share success stories and lessons learned as they returned to their nonprofits and put new learning into practice. Participants will:

- Share lessons learned with fellow cohort members
- Offer input and suggestions to fellow cohort members as they share
- Provide feedback to help the Area Foundation strengthen future programming

Who should attend: Nonprofit Management Program participants

Date/Time: Thursday, August 10 from 9 to 10:30 a.m.

Location: Virtual