

The Standards for Excellence® 2-Day Implementation Workshop

- ✓ Are you an organization that wants to move to the next level of effectiveness?
 - ✓ Would you like to incorporate the latest “best practices” in nonprofit leadership and management but aren’t sure how and could use some support?
 - ✓ Would you like to have the potential of raising more money because donors and funders are confident about the quality of your programs and you have evidence to prove it?
 - ✓ Are you feeling like there is something “more” you could do to promote excellence in your organization?
- If the answer to any of these questions is YES, YOU (and your board/leadership team members) have the opportunity to attend the **Standards for Excellence® Ethics and Accountability Program for the Nonprofit Sector**.

The Two Day Program Includes:

- ✓ The newly released 2.0 Standards. In addition to the focus on governing board practices, program evaluation, human resources, finance and fundraising, you will receive supports on succession planning, crisis and disaster planning, strategic partnerships and more.
- ✓ Interaction with your peers to help you learn how their best practices can help you make improvements to your operations.
- ✓ Useful tips and strategies about how to apply the standards to your organization.
- ✓ A checklist to conduct a self-assessment to determine how well YOUR organization is already performing.
- ✓ Creation of an action plan to apply what you learned. The “space” between the sessions gives you the opportunity to implement new ideas in-between as well!

Learning Objectives:

- ✓ Understand the Standards for Excellence® criteria as listed in the Self-Study Application Checklist
 - ✓ Assess your organization’s current compliance with the Standards
 - ✓ Utilize the Standards to develop outline for improvements
- Who Should Attend?
- ✓ Executive Directors, Board Members and Nonprofit Administrators

Agenda:

Day 1
Mission, Program and Evaluation
Leadership: Board, Staff and Volunteers

Day 2
Legal Compliance and Ethics
Finance and Operations
Resource Development
Public Awareness, Engagement and Advocacy

For more information on the Standards for Excellence, visit: www.pano.org/Standards-For-Excellence
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*PANO amplifies the impact of the community benefit sector through
advocacy, collaboration, learning and support.*



Guiding Principles Webinar Series

The Standards for Excellence Guiding Principles Webinar Series was developed to provide the information from the Clinic Series in a convenient, condensed webinar format. The six (1.5-hour) Webinar Sessions are designed to meet the needs of today's busy nonprofit executives, and take place over three to four months. Recordings of the sessions are also available to listen at your convenience or share with other staff/board members.

The sessions focus on the following areas:

- I. Governing Body & Conflict of Interest
(Guiding Principles Webinar Series: 1 of 6)
- Board Responsibilities
 - Board Conduct
 - Board Composition
 - Conflict of Interest Policy/Procedures
- II. Human Resources (Guiding Principles Webinar Series: 2 of 6)
- Personnel Policies
 - Volunteer Policies
 - Employee Performance Evaluation
 - Employee Orientation
- III. Mission & Program (Guiding Principles Webinar Series: 3 of 6)
- Mission
 - Organizational Evaluation
 - Program Evaluation
 - Program Service

IV. Financial & Legal (Guiding Principles Webinar Series: 4 of 6)

- Annual Budget & Financial Reports
- Audits & Financial Policies
- Legal Compliance and
- Accountability
- Internal Legal Audit

V. Openness & Fundraising (Guiding Principles Webinar Series: 5 of 6)

- Annual Report | Public Access
- Donor Relationships & Privacy
- Acceptance of Gifts
- Employment of Fundraisers

VI. Public Affairs & Public Policy (Guiding Principles Webinar Series: 6 of 6)

- Public Policy Advocacy
- Nonprofit Lobbying
- Public Education
- Promoting Public Participation

**Bonus! Also included are resources, sample policies and templates available through the Standards for Excellence Educational Resource Packets.
Satisfies education requirement for certification and recommended training for Tier One**



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