



Nonprofit Fundamentals Certificate Program

The Pathways' Nonprofit Fundamentals workshop series will help your organization build a sustainable future by increasing your knowledge of the fundamentals of running a successful nonprofit. Nonprofit Fundamentals Certificate Program courses are offered to nonprofit organizations based in the 18 counties of western North Carolina. Take eight of the 20 Nonprofit Fundamentals courses in the series to earn a Nonprofit Fundamentals Certificate!

Fundamentals workshops are free for participants from WNC-based organizations with budgets under \$50,000. For organizations with budgets over \$50,000, the cost of each online course is \$50 per person. *Pathways is committed to making these courses accessible to all nonprofit leaders in WNC. If you would like to attend, but the cost is a barrier, please don't hesitate to reach out to us at contact@nonprofitpathways.org.*

Upon completing each course, participants affiliated with nonprofits based in and serving one of the 18 western North Carolina counties will be eligible for **three hours of free follow-up coaching** to help you implement what you learned back at your organization. Coaching will be provided on a first-come, first-served basis and will be dependent on instructor availability.

Please let us know if you have any special accommodation needs to attend workshops. It is requested that individuals requiring language interpretation, auxiliary aids such as sign language interpreters, and alternative format materials notify us at least seven working days in advance. Every reasonable effort will be made to provide accommodations in an effective and timely manner.

Spring 2022 Class Information

***click the class title to register**

[Exploring Equity 201](#)

Instructor: Danae Aicher

January 19 & 20; 10:00 am – 1:00 pm

***Equity 101 is a prerequisite to register and only open to those who have completed the class.**

Even when we are doing good work in our nonprofits, oppressive and exclusionary practices can exist. This six-hour advanced level equity course will build on the foundational principles and concepts of Exploring Equity 101, in which participants gained an understanding of unconscious and implicit bias, personal identity, and systemic racism.

In this brave space, participants will deepen their understanding of the common mechanisms that perpetuate white supremacy culture in nonprofit organizations, systems, policies, and practices. The goal of this workshop is to develop a practice of thinking critically to institutionalize equitable practices within our organizations. Workshop participants will be challenged to intentionally and creatively operate in a manner that interrupts systemic oppression in and throughout their organization. Get ready for honest dialogue, active listening, courageous conversations, and participatory change.



Danae Jones Aicher is an experienced Equity and Inclusion facilitator with a gift for creating brave spaces for people to address difficult topics around race within their organizations. Danae is a former mass communications professional with a degree in history and more than 20 years of experience in news, politics, and public relations. She utilizes her experience to help teams understand how racist systems and policies replicate and perpetuate themselves in an ongoing cycle unless they are intentionally interrupted.

Grant Writing 201

Instructor: Mark Goldstein

February 9 & 10; 9:30 am – 12:30 pm

****Recommended prerequisite: Grant Writing 101 or intermediate level experience.***

As grant writers gain experience, they play an increasingly significant role in fundraising. This course for developing and intermediate proposal writers helps demystify the more advanced aspects of grant writing that may follow. These include writing federal grant applications; improving upon project budgets; building systems that save time, reduce effort, and improve organizational readiness for grant opportunities; navigating organizational weaknesses or dysfunction; presenting community needs without inadvertently denigrating clients; maintaining national grant writing standards; and stewarding and reporting on grants. Attendees will be inspired to reach new heights and to develop a plan for achieving personal and organizational proposal writing goals.



Mark Goldstein, CFRE, is most sought after as an expert proposal writer and project strategist. He is the President/CEO of Communication Mark, a grant writing firm founded in 2000. Mark originated the Open Communication Fundraising Model, a system that enables organizations to work cooperatively toward community and fundraising goals. Mark has consistently served nonprofits as a staff member, board member, or consultant since 1991. He has raised more than \$60 million for his clients and employers by obtaining grants for organizations of all types, sizes, and locales, particularly for health, human services, community development, and technology needs. Mark is an active member of the Association of Fundraising Professionals (AFP) of WNC and the Grant Professionals Association.

Basic Accounting for Nonprofits

Instructors: Michelle Tracz, CPA, CFE, CGMA & Wade Rogers, CPA

February 23 & 24; 9:30 am – 12:30 pm

Do you struggle with how to account for and record the financial transactions of your agency? You're not alone! This course will help you understand the basic accounting rules that govern how all transactions are recorded and how funds are tracked. You will also learn what is meant by double-entry accounting and natural account balances in your accounting structure so that you can make sense out of your chart of accounts. We will explore differences between accrual-based and cash-based accounting, strategies for making the most out of your accounting system, how to employ sound accounting policies and controls, and why nonprofits should not ignore sales tax consequences in their accounting transactions. Finally, once we know how the transactions are recorded, we will see how they come together to form financial reports so that staff, Board, and stakeholders have the information they need to support your organization's mission.



Michelle Tracz, CPA, CFE, CGMA has over 30 years experience encompassing public accounting, internal auditing and compliance, as well as financial management in manufacturing and not for profit industries. In 2012, Michelle Tracz, CPA, CFE, PLLC, was established as an accounting and consulting practice. The firm specializes in assisting small to mid-sized businesses and not for profit agencies, to help them meet their accounting and financial reporting needs, as well as fill gaps in staffing and manage special projects. Michelle and her team assist business owners, CFO's, Executive Directors, Controllers, and Board Members by providing Contract CFO, Contract Controller, Accounting/Bookkeeping, and Consulting services.



Wade Rogers, CPA, has over 30 years of experience in accounting and finance, including 20 years in the nonprofit sector. A CPA, he is a graduate of Florida State University (BA Accounting) and the University of Illinois (MS Accounting). Wade started his career with an international public accounting firm, followed by positions with a multinational manufacturing company in the US and France. Transitioning to the nonprofit sector, Wade has worked as the controller of a private foundation and finance director of several nonprofit public charities. In addition to his work with WNC Nonprofit Pathways, he now works as an independent consultant assisting nonprofit organizations in implementing and maintaining effective financial reporting and control environments.

Fundraising Essentials 201: Expanding Your Impact

Instructor: Angela Kemper, CFRE, MA

March 2 & 3; 9:30 am – 12:30 pm

*** Recommended prerequisite: CFRE and/or 5+ years in professional fundraising or development experience.**

Do you find yourself pulled in multiple directions to raise funds to support your organization's work? In this 200-level workshop, you will learn how to create reliable systems that result in increased giving. The key to achieving your organization's next level of success is expanding your donor and prospect pipeline, from acquisition to transformational giving. In this interactive workshop, you will cover the science and best practices for effective major donor fundraising, mid-level donors and upgrades, and strategic donor segmentation. We will also explore new messaging concepts that engage funders in need of, and impacted by, your organization's work. Get ready to develop practical strategies for implementation that strengthen your fundraising plan, share ideas with colleagues, and tailor several systems to apply in your own work.



Angela Kemper, MA, CFRE, is a successful fundraiser, trainer, and consultant with expertise in strategic communication that has generated results in nonprofit and corporate organizations for more than 30 years. She has held executive positions for fundraising and membership programs, leading to successful multimillion-dollar capital campaigns, double-digit increases in annual campaigns, special events and membership growth, and expanded staff and board capacity. As a consultant for more than 23 years, Angela has worked with nonprofits and funders in North Carolina, the Southeast, and nationally. Her expertise includes annual and campaign fundraising, donor base analysis and portfolio development, membership program growth, nonprofit capacity building, strategic planning, and board development. She is an Association of Fundraising Professionals Certified Master Trainer and has completed BoardSource's Certificate of Nonprofit Board Consulting

Evaluation

Instructors: Emily Kujawa & Jill Fromewick, ScD, MS

March 9 & 10; 9:30 am – 12:30 pm

This workshop combines teaching with small group discussions to introduce practical methods for program evaluation. During this interactive session, you will:

- Understand the value and varied applications of program evaluation;
- Learn the utility of a Theory of Change for evaluation, planning, and communication;
- Become familiar with Results-Based Accountability™, an approach commonly used by organizations, agencies, and funders for program evaluation and improvement;
- Learn how to write a practical evaluation plan;
- Understand the pros and cons of various data collection methods such as surveys, interviews, and focus groups;
- Be able to describe considerations for communicating your program evaluation results to various audiences.

By the end of the day, you will have started a Theory of Change and an evaluation plan for your program, and you'll take home templates and tools to complete with your program stakeholders. This course is appropriate for representatives from organizations of any size or developmental stage, whether you are new or experienced in the nonprofit field.



Emily Kujawa is the Project Manager & Improvement Specialist with WNC Health Network. In this role she oversees special projects to provide facilitation, strategic planning and evaluation support, and training in Results-Based Accountability™ to build the capacity of hospitals, public health departments, and their community and regional partners across western North Carolina. Emily has 12 years of experience in public health policy, community health systems transformation, and community health improvement. Emily holds a Master of Public Health degree in Nutrition from the University of North Carolina at Chapel Hill Gillings School of Global Public Health, as well as a Master of Public Health degree in Health Promotion from the George Washington University.



Jill Fromewick, ScD, MS, is Founder and Executive Director of Sparrow Research Group, which specializes in program evaluation and UX (user experience) research. She is a social epidemiologist by training, with two decades of domestic and international research and evaluation experience. Guided by a background in qualitative and quantitative methods as well as community participatory research, she enjoys collaborating with others to collect, analyze, synthesize, and share data that can be used for decision making and to strengthen program impact. Jill has her MS in Health and Social Behavior, and Doctorate of Science in Social Epidemiology from Harvard School of Public Health.

[Adaptive Leadership](#)

Instructor: Althea Gonzalez

March 24 & 25; 9:30 am – 12:30 pm

Organizational leadership is a complex undertaking. Nonprofit leaders are asked to develop a vision for the future while supporting their organization in navigating the dynamic and ever-changing waters of the present. Adopting an adaptive approach to leadership enables individuals and organizations to adjust and thrive in challenging environments. This interactive session will provide practical tools for you to:

- Understand the difference between leadership and management, and the benefits of equitable and inclusive leadership
- Explore various leadership styles and learn in what situations each is most effective.
- Identify and learn to navigate a VUCA environment (Volatile, Uncertain, Complex, Ambiguous), including avoiding the tendency to look for technical solutions when transformational strategies are called for instead.
- Discuss the application of reflective practice to your leadership, your team, and as a tool for organizational learning

This session is designed for nonprofit executive directors, senior leadership staff, and board leaders who want to increase their effectiveness.



Althea Gonzalez is a seasoned, bilingual (English/Spanish) and bicultural professional with over 20 years' experience in the nonprofit and philanthropic sector in a range of consulting, coaching, and leadership roles with emphasis on projects involving grassroots, immigrant, and Latinx communities. She's worked with hundreds of organizations across the U.S. facilitating community conversations, leading grantmaking programs, and providing consultation and training on organizational capacity-building topics such as board development, equity, and strategic planning. In addition to her work with organizations, Althea is an executive coach serving as a thought partner, an accountability coach, and a resource connector for organizational leaders. She holds an M.A. in Adult Education, specializing in Training & Development, from NC State University and a B.A. from the University of Chicago. Althea has lived in Western North Carolina for over 25 years. Born and raised in Miami, Althea is the proud daughter of Cuban refugees.

Sustainable Strategic Planning for Nonprofits

Instructor: Melissa Metcalf Le Roy

April 7 & 8; 9:30 am – 12:30 pm

As our world and communities change, we are called to adapt and reflect the changing landscape while staying true to our organization's core purpose. Strategic planning creates the space for visioning that is often hard to find in the day-to-day hustle.

This class will examine the parts of a strategic plan, including the vision and mission statement, values, and goals that will guide the organization into the future. You will:

- Explore strategic decision-making tools you can use to analyze your respective nonprofit and plot a course for your organization's future.
- Learn about SWOT Analysis, BCG Matrix, the Sustainability Matrix, and the Strategy Canvas.
- Have the opportunity to work in small groups and apply the tools you learn, evaluate an organization, and understand the process of constructing a Sustainable Strategic Plan.



Melissa Metcalf Le Roy, a graduate in Entrepreneurship, with a minor in business law of Western Carolina University and a graduate in Nonprofit Management of Duke University teaches non-profit management classes throughout North Carolina, South Carolina and Virginia for Duke University and Western Carolina University. She is a past board member of the North Carolina Center for Non-Profits. For four years she contributed a regular “Non-Profit Leadership” column for the Tryon Daily Bulletin, and currently offers her services as a consultant through her own firm, OnFire Nonprofit Consulting. You can also view her TEDx talk “[A Love Affair, the Art of Not Asking](#)” on Nonprofit Fundraising.

Strong Boards for the Long Haul

Instructor: Allison Jordan

April 26 & 27; 9:30 am – 12:30 pm

Strong Board Development is the answer to all of the Board Struggle questions. Boards are made up of well-meaning, passionate volunteers who, unfortunately, aren't always clear on their roles or their place on the Board. This is where the tension often arises or when board members start to fade away. Join Former Executive Director and current Board Member Allison Jordan to learn the Board Building Cycle and create a shared mission between the Executive and the Board of Directors.

- Difference between Board Development and Nominating
- Definition of Board Development
- Who's responsible for developing the Board
- A year in the life of the Board Development Committee



Allison Jordan is a certified Coach, Executive Director, Mentor and Trainer who helps leaders meet their goals, grow and do good in the world. After leading Children First/Communities In Schools of Buncombe County as chief executive for 11 years Allison Jordan became a coach and executive director mentor to help other leaders succeed, and help them better support their teams. Allison has served as the Director of Training for Organizational Impact for Communities In Schools NC, the Executive Director of Children First/Communities In Schools of Buncombe County and Board Member for numerous boards. Allison holds a Master's of Science in Community Leadership from Duquesne University, a

Bachelor of Arts in Psychology from UNC-Asheville, a certificate from CoachU, a certificate from BoardSource for Nonprofit Board Consulting and is Dare to Lead Trained.

Individual Donor Development

Instructor: Kimerly Hinkelman

May 4 & 5; 9:30 am – 12:30 pm

Understanding how to raise money from individual donors is paramount to nonprofit organizations. Finding and cultivating individual donors is a work-intensive, long-term investment for any nonprofit. Learn how to master practical techniques for successful individual contributions related to prospect research, cultivating individual support, making "the ask," and stewardship. Also, where to start your prospect research, tips on best research sites, and utilizing the information found to cultivate and solicit potential donors. Participants will learn how to build and use donor databases to implement fundraising strategies successfully.



Kimerly Hinkelman has been a trusted leader, resource, and advocate for nonprofit organizations for over 35 years and applies her diverse leadership experiences to assist health & human service organizations across the country to advance their missions. As the principal with Hinkelman and Associates, Kim is known as someone who takes the panic out of projects for her clients because she always brings a sensible, level-headed approach. Her professional experience includes serving at executive-level leadership positions for health systems, hospital foundations, and nonprofit agencies. A frequently sought-after facilitator and teacher, Kim's specialty areas include fund development and fundraising, external relations and partnerships, strategic planning, volunteer programs, and board development.

Communications

Instructor: Stacey Parkins Millett

May 10 & 11; 9:30 am – 12:30 pm

Effective communication plans play a crucial role for nonprofits. Communicating clearly and persuasively is vital to a successful nonprofit organization. This workshop will help you develop the tools and strategies to pull all the pieces together to create a communication plan, whether to raise money or awareness of your mission. Learn new skills and gain resources to help your organization achieve your communication objectives and create a thoughtfully developed plan to address your nonprofit's most pressing goals.

You will discover how to:

- Craft a communication strategy
- Clarify your organization's attributes and develop messages to stand out
- Understand your audience and market
- Develop strategies for public outreach, including media relations and social media
- Explore crisis communication guidelines



Stacey Parkins Millett provides consultant services to non-profits after a full-time career in philanthropy, health equity, and community development. She's held leadership roles in local, regional, and national organizations. Her early career as a journalist with CBS and PBS TV stations in Harrisburg, Pennsylvania involved writing news stories and documentaries. She shifted gears to assume leadership roles in community development and grantmaking in hopes of advancing the common good. Now, after 30 years she's resumed her writing passion with a focus on fiction. Stacey practices Yoga, relishes swing dancing, and has run sixty marathons. She grew up on New York City's Lower East Side and lives between her childhood home and Asheville, North Carolina.

Human Resources

Instructor: Nicole Norian, SPHR

May 18 & 19; 9:30 am – 12:30 pm

Your employees are essential to achieving your mission. As a leader, understanding how to have effective and engaged employees is crucial. This course helps nonprofit leaders explore key components of attaining and retaining the workforce necessary for your organization to be successful. Explore HR's role throughout the employee lifecycle. Learn how to better manage day-to-day HR operations while also leading strategic initiatives. Strengthen your skills in coaching employees to accelerate performance. Explore practical solutions to common HR challenges, such as bringing an equity lens to all aspects of HR. Identify federal employment laws that impact your organization. Discuss current HR trends and issues. The class will provide seasoned leaders and those who are just starting their journey as leaders of a community nonprofit with new ideas and tangible take-aways.



Nicole Norian, SPHR, combines more than 3 decades of HR leadership in public and nonprofit organizations with curiosity and creativity as she focuses on meeting HR needs in ways that make sense for each organization. She understands the joys and challenges of working in mission-driven organizations: being strategic and hands-on, working with limited resources, and having a high sense of accountability to those you serve and represent. Nicole brings an equity lens to her HR consulting; she is committed to fostering diverse, equitable, and inclusive workforces by building a culture where differences are valued and employees are empowered to bring their full, authentic selves to work. Her consulting practice, Chrysalis HR Consulting, specializes in mission-driven organizations--small

businesses, not-for-profits, education, and other social enterprises.