

- * Refers to training options to fulfill the training requirement for Standards for Excellence® Certification. Choose any one of these programs to meet the requirement.
- ▲ Refers to training options recommended for implementation of the Tiered Approach Tiers 1 & 2. The Introductory Session plus one of the other trainings is recommended.

* ▲ Training Programs and Descriptions

▲ Standards for Excellence® Introductory Session – *Half-Day Program*

Use the Standards for Excellence ethics and accountability code to assess and strengthen your organization and identify ways to improve its governance, financial systems, personnel practices, fundraising and more. Eight Guiding Principles and fifty-five best practice Standards promote excellence and integrity in nonprofit management and strengthen the public trust in Pennsylvania’s nonprofit organizations. Come and learn about a program that:

- Promotes the highest level of public confidence
- Helps an organization be more focused in planning and organizational efforts
- Energizes board and staff, creating more informed staff and more active board
- Increases credibility with donors and the public
- Attendance of both an Executive Director/CEO and a board member will maximize the value and outcome of this program.

* ▲ Standards for Excellence® Implementation Workshop – *Full-Day Program*

The "Pass to Excellence" provides organizations with an opportunity to learn about the specific elements of the *Standards for Excellence: An Ethics and Accountability Code for the Nonprofit Sector*® and assess themselves against its benchmarks. Includes one full-day training and one recently updated Standards for Excellence® Educational Resource Packet CD per organization (24 "Ed Packets").

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

* ▲ Standards for Excellence® Clinic Series – *Four 4-Hour Programs or Two Full-Day Programs.*

This training provides educational support for assuring the implementation of all the standards and is also needed for organizations interested in participating in the voluntary certification program. This course combines classroom instruction and peer-to-peer learning and covers every Standard in the Standards for Excellence. Organizations enrolled in the clinic series may send multiple representatives to each session. At the conclusion of the series, organizations will be well on their way to completing the Standards for Excellence application. Includes one recently updated Standards for Excellence® Educational Resource Packet CD per organization (24 "Ed Packets"). You do not need to apply for certification to attend the Clinic Series.

* ▲ **Standards for Excellence® Guiding Principles Webinar Series – Six 1.5-Hour Webinars**
This training provides educational support for assuring the implementation of all the standards and is also needed for organizations interested in participating in the voluntary certification program. This six session web-based course covers every Standard in the Standards for Excellence. Each webinar session is 1.5 hours. The series generally takes place over four to five months. At the conclusion of the series, organizations will be well on their way to completing the Standards for Excellence application. You do not need to apply for certification or the Tiered Approach to gain value from this webinar series.

* ▲ **Standards for Excellence® One-on-One Training – Half-Day Program**
The One-on-One Training is a condensed version of the traditional 16 hour Clinic Series offered throughout Pennsylvania. The One-one One Training targets board members and key staff from an organization to ensure implementation of legal requirements and “best practice” in the Standards for Excellence Code. This session is scheduled at the convenience of the organization requesting the services. The training is four hours in length. One-on-One Training provides for: board members and key staff to attend the training session; one Educational Resource Packet CD that contains the 24 “Ed Packets.”

Form 990 From a Savvy Donor’s Perspective – Half-Day Program

Because most charities’ Form 990s are instantly available on the internet, they can be a charity's most important public relations document. They can also be traps for the unwary that lead to confusion, serious adverse publicity and governmental sanctions. In this training, you will explore and discuss the new Form 990 from the perspectives of a donor and a regulator and discuss best practices for using the Form as a tool to provide transparency on a charity's operations. The Form 990 has been significantly changed from previous versions. Our presenters bring with them extensive experience in nonprofit law. The session includes resources from the Standards for Excellence program to fully ensure a positive picture of your organization. This course is designed for key administrators and board members of 501(c)(3) organizations.

Fundraising Practices: Track it Right! Book it Right! Report it Right! – Half-Day Program

If you are a nonprofit administrator or board member currently involved in fundraising or intending to implement some fundraising efforts, you need to attend this program. With the increased focus of the IRS and the Department of State on fundraising activities and reporting and a more educated public donor base, it is critical that nonprofit representatives understand the technical aspects of fundraising activities and accounting for these activities. Attendance at this session will help you be prepared and prevent risk.

Governing Boards: Avoiding Risks and Maximizing Opportunities – Half-Day Program

This program is for nonprofit board members and key staff. Participants will acquire a thorough knowledge of regulatory requirements, tools and tips for more effective and efficient board management, how to do a legal audit of your organization without going outside for help and appropriate roles for board and staff-how to avoid the pitfalls of crossing professional boundaries. PANO believes that education is essential to creating strong Governing Boards and that strong Governing Boards create stronger and more sustainable organizations. This program often conducted from 4:30p.m.-7:30p.m. to make it more convenient for board members to attend.

For more information about Standards for Excellence training, visit our Event Calendar at www.pano.org, or Tish Mogan, Standards for Excellence Director, at tish@pano.org. Typical Half-day program rates are \$62 PANO Members/\$118 Non-Members. Typical Full-day program rates are \$104 PANO Members/\$188 Non-Members. For required/recommended trainings, rates vary. Sponsorships are also available to reduce program fees for attending organizations.