

PANO Trainer Procedures

What You Need to Know About Becoming a PANO (Pennsylvania Association of Nonprofit Organizations) Trainer

We are pleased that you are interested in becoming a trainer for PANO. Many consultants and trainers find the experience a helpful way to connect with individuals working in the sector and to keep up-to-date on issues in their areas of expertise, while, at the same time, giving back to the nonprofit sector.

Any individual who is interested in becoming a PANO trainer must: read this document in its entirety, complete the online Trainer Application, and sign and date the Trainer Agreement Form and return it to PANO. If you wish to qualify as a Standards for Excellence Trainer, you must complete the above three steps, as well as go through additional training. Please contact Tish Mogan at (717) 236-8584 x1001; tish@pano.org if you are interested in becoming a Standards for Excellence Trainer.

Please note: Completing the steps mentioned above does not guarantee that there will be an opportunity for PANO to utilize your services as a trainer.

About PANO

PANO is the statewide membership organization serving and advancing the charitable nonprofit sector through leadership, advocacy, education and other services in order to improve the overall quality of life in Pennsylvania. PANO helps charities become more efficient and effective through collaboration, cooperation and the sharing of resources and information. PANO helps charities succeed together where they can not succeed separately.

One of the many ways PANO supports the nonprofit community is to provide comprehensive training programs. These programs are designed for existing and new nonprofit board members, executives, and staffs, enabling them to achieve excellence in governance, executive leadership, financial and human resources management, legal and regulatory compliance, and resource development.

On average, more than 1,800 people attend the 50+ training programs sponsored annually by PANO at locations all over the Commonwealth.

Training Areas for PANO

We provide a wide range of nonprofit training programs, ranging from introductory skills and knowledge seminars to advanced professional development series. We encourage prospective trainers to think about developing Training Series (multiple sessions) that develop specific skills from introductory to advanced levels of mastery or offer a comprehensive exploration of a specific topic or subject matter.

PANO offers training programs in the following topic areas:

- Advocacy and Public Policy
- Financial Management

- Fundraising and Resource Development
- Governance and Board Structure
- Human Resources and Personnel
- Information Technology
- Legal
- Long and Short Range Planning
- Marketing, Communications, and Public Relations
- Organizational Development
- Program Evaluation
- Standards for Excellence – Ethics & Accountability
- Volunteer Management
- Work Skills Development

Please note: Training programs are generally not industry-specific (i.e., targeted to a particular type of nonprofit, such as health organizations or family services). Our training programs, instead, are geared to the nonprofit sector as a whole.

Benefits of Becoming a PANO Trainer

- Contribute to the growth and expertise of the nonprofit sector
- Demonstrate your expertise and gain visibility among nonprofit organizations within Pennsylvania
- Have your bio printed on our website, where it can be viewed by our members

Expectations of a PANO Trainer

General

- Expert knowledge in the proposed subject area
- Demonstrated knowledge of the nonprofit sector
- Experience conducting trainings or roundtable sessions, preferably to audiences with various levels of understanding in the topic area
- Commitment to provide participants with meaningful and useful information that supports their ability to serve the public, while promoting the highest standards of ethics and accountability in nonprofit governance and management
- Professional representation as a trainer for PANO. Please note that marketing your services or materials outside of the scope of your specific PANO program is prohibited. (See the *Promoting Your Business* section below for specifics.)
- As a representative of PANO, trainers must never present partisan information per the requirements of our organization's 501(c)(3) status.
- Members and attendees of our trainings represent a diverse array of organizations. Participating individuals hold a variety of political, social, religious, and personal beliefs, and presenters must be respectful of the views and opinions held by participants. Presentations may explore these issues as they relate directly to the training topic; however, presenters are prohibited from advocating and/or proselytizing for the specific political, social, and/or religious beliefs the presenter may hold.
- Trainers for PANO must demonstrate an understanding of the Standards for Excellence Ethics and Accountability Code, which can be accessed here: <http://www.pano.org/documents/standardscode.doc>.
- Assist PANO in the marketing of program(s).

Program Specific

- Submission of training program description (a single paragraph up to 250 words long) and a biographical sketch (new programs only)
- Commitment to hold a program when five or more individuals have pre-registered (unless otherwise negotiated prior to course being listed)
- Submission of requests for AV equipment at least two weeks prior to the scheduled program date
- At least two weeks in advance of the scheduled program date, any handout materials to be copied must be submitted to PANO. (PANO is happy to provide copies for the program provided you allow us two-week lead time to produce them. Alternately, you may bring handouts for the participants with you to the program, copied at your own expense.)
- Inclusion of a line on your cover slide (if applicable) that reads, "On behalf of PANO," and also the inclusion of the presentation date. The same should appear on the first page of any handouts.
- Arrival at the training program site at least 30 minutes prior to scheduled program start time to confirm room layout and equipment setup.
- Relevant and meaningful handouts that help participants apply the material covered when they return to the workplace. Participants consistently request handouts that include case studies (illustrating both the good and the bad) and examples (sample press releases, sample letters, or examples of real-life successful proposals, for example). Participants prefer handouts that contain step-by-step instructions or other tools that can be applied in their workplace. Think, "Don't just tell me – Show me."
- Incorporate a 10-minute break for every 1½ hour of class time.
- Responsible for collecting program evaluation surveys and returning them to PANO, in order to provide PANO with feedback.

Expectations of PANO

PANO Shall:

- Work with trainer(s) to provide reasonable assistance in the provision of services
- Coordinate program scheduling, registration, marketing and logistics, with trainer collaboration
- Review and approve program curriculum

Length of Sessions/Session Times

Training programs typically range from three hours to a full day, but can be adjusted based on what is appropriate for the proposed program(s). We may also work with several trainers to pull together a double-header or a specific series of training programs. Generally, we schedule morning programs from 9:00 a.m. – 12:00 p.m.; afternoon sessions from 1:00 – 4:00 p.m.; and evening sessions from 4:30 – 7:30 p.m. Full-day sessions are generally scheduled from 9:00 a.m. – 4:00 p.m.

Class Size

Registration often varies by topic and location, and we cannot guarantee a specific number of participants. PANO commits to holding a program with a minimum requirement ranging from five to ten individuals who have registered in advance. (Note: Decisions regarding cancellation

will be made depending upon expenses and travel involved). Why five to ten? In order to maintain the quality of our training programs, and understanding that participants learn from their interaction with others in the classroom, we have determined this is a reasonable minimum. If you need to limit your session to fewer than 40, please let us know during the planning phase so that we do not oversell your program. Generally, we expect an average of 15 registrants per program. Approximately two weeks before your class, we will remind you of your program and ask you for a copy of your handouts and for your AV requests. At that time, we will provide you with a current headcount. We will keep you abreast of the headcount as the date of your program approaches.

To Participate

There are a few things we need from you to begin processing your information to become a trainer.

For New Programs:

1. **COURSE OBJECTIVE** – When participants finish this training session, what should they know or be able to do?
2. **NARRATIVE DESCRIPTION** – Please provide a brief description (a single paragraph of 250 words maximum) describing your training program. Please include an introduction on why people should attend, details on what participants will learn, and what participants will be able to take back to their respective organizations. Please make sure that you include the title, the background of the intended audience (is there previous experience they should have), and the level of complexity (is it an introductory-, intermediate-, or advanced-level session).

Note: *We are working on standardizing our descriptions within our training calendar. It is possible that we would use the title and/or description we develop with you for another trainer at another time.*

You may simply list the programs that we have already offered that you are qualified to teach. (Please note that some classes are taught only by PANO staff members). Feel free to visit our website at www.pano.org or obtain a copy of our printed training calendar to familiarize yourself with our programs.

3. **BIOGRAPHY** – Please provide at least one brief biography (bio) of no more than 50 words in length for our program flyers. If you choose to do so, you can submit a longer bio of no more than 250 words in length for the program page on our website. You may choose what biographical information you would like to share with attendees on the day of the event, but please try to keep the reading of your bio to about one minute in length. The bio allows interested participants the opportunity to familiarize themselves with your experience and expertise. This is your opportunity to demonstrate your credibility and build rapport with the participants by telling them who you are, something about your company, what you do, and how it relates to the training. You may wish to include your current position, expertise, past experience, education, and recent awards or other pertinent information. This is the appropriate method for promoting yourself and your company. Please do not use additional class time to promote your organization.

If you are planning to team teach, please provide a bio for each presenter. Once your class is scheduled, please do not arbitrarily replace the approved instructor with another instructor or add instructors to the class with prior approval of PANO.

4. **REFERENCES** – Please provide at least three references with contact information to verify both your expertise in a particular area and your training skills. Please provide copies of evaluation forms from at least two programs that you have previously presented.
5. **LOCATION PREFERENCES** – As a statewide organization, PANO provides training in all areas of the Commonwealth. We like our trainers to be flexible and willing to conduct training programs in any of these areas; however, we realize this is not always feasible. As a result, we would like you to identify the areas where you would be most willing to present, and any other pertinent information about times and places, such as preferred days of the week, times (morning, afternoon, or full day), etc. Within each program description on our website, PANO will provide either directions or access to directions to the program location.

Membership

While we don't require that you become a member of PANO to conduct training sessions, we strongly encourage you to consider joining as a corporate member. A corporate membership affords you the following benefits:

- Day-to-day technical assistance
- Discounts on publications, conference and exhibitor fees, office supplies, enews sponsorship, conference calls and more
- Ongoing communication (quarterly newsletter "Keynotes" and bi-weekly enews)
- Listing on the Consultant portion of our website (www.pano.org)
- Access to invaluable networking and information, including PANO's member-only LinkedIn Group
- Access to the mailing list of PANO members, pre-merged in MS Word as labels, upon request. (All contact information remains the property of PANO).

Individual memberships are also available. To learn more about the benefits of joining PANO, please visit our website at www.pano.org.

Please note, PANO membership DOES NOT guarantee that you will be chosen as a PANO trainer. To ensure the quality of our programs, we reserve the right to explicitly select our trainers.

Promoting Your Company/Organization

PANO strives to offer high-quality training programs, not sales pitches. We require trainers to adhere to protocols of professionalism as volunteers for PANO. If you have any questions, please do not hesitate to ask.

The biographical sketch you provide us (as described above) is your opportunity to promote yourself and your company. The bio will be published on the specific event page of our website during the time period leading up to your training program. Please plan to present the same bio to program attendees. Please do not use additional class time to promote your company or to collect information from class participants.

Our guiding principle is that a participant must "opt-in" to receive future correspondence from trainers. Our expectations of the protocol a trainer must follow are that 1) presenters may

include their contact information in the handouts or give out a brochure, business card, or promotional gift; 2) presenters may mention their company and any major accomplishments in their biographical sketch (150 words maximum); and 3) presenters may encourage participants to contact them directly if they have any questions about the training program. You may ask participants for business cards with the offer to keep in touch. **PANO DOES NOT provide trainers/volunteers with the personal contact information of our program participants. Some instructors pass around a sheet requesting contact information with the promise to send supplemental information to participants after the class. While you may solicit contact information from participants in this way, any such solicitation MUST clearly state that providing the information is voluntary and that it is for use by you and not PANO. You must also have provisions for allowing individuals to opt out of any mailing and/or marketing lists.**

Compensation

By thoroughly reading this orientation, completing the Program Information application, and signing the Trainer Agreement Form, you will have taken the first steps necessary to participate in the PANO trainer process. After PANO has received all necessary and appropriately completed documents from you, we will review these documents and make a determination as to whether or not we are able to offer you the opportunity to become a PANO trainer. This means that all trainers new to PANO will be required to teach your first two PANO programs on a pro bono basis. If, after your first two trainings, PANO decides that we would like to utilize your services as an official PANO trainer, we will notify you and we will work out a compensation plan with you.

Your compensation plan may be structured in one of three ways:

- Plan 1. You may offer your services to PANO, free of charge.
- Plan 2. You may request payment of any percentage up to 30% of your program's total revenue after all expenses have been paid, not to exceed \$500 for a half-day program or \$850 for a full-day program. (Expenses may include, but are not limited to: program setup & registrations; room rental; program folders & materials; refreshments for program attendees; and presenter travel, meals & overnight).
- Plan 3. If you would like to do some programs on a pro bono basis and you would like to be compensated for some programs, you may combine Plan 1 and Plan 2.

***Please Note:**

- Standards for Excellence has a separate compensation plan for Clinic Sessions. Please contact Tish Mogan (tish@pano.org) for more information.
- If you require overnight lodging, please contact PANO and we will reserve a hotel room for you.
- Reimbursement for mileage and/or tolls is available upon request, however PANO would greatly appreciate any costs that you are able to defray.

Again, thank you for your interest in becoming a PANO trainer. We hope to work with you in the near future.

If you have any questions, please don't hesitate to contact PANO.

Megan Resser
PANO
777 East Park Drive, Suite 300
Harrisburg, PA 17111

Phone: (717) 236-8584
Fax: (717) 236-8767
Web: www.pano.org