

NONPROFIT FUNDAMENTALS **WORKSHOP APPROVAL FORM**

1. Certificate Participant Information

<p>Certificate Participant: _____</p> <p>Contact Information:</p> <p> Phone: _____</p> <p> Email: _____</p> <p> Address: _____</p>
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2. Workshop Information

<p>Name of Workshop: _____</p> <p>Date of Workshop: _____</p> <p>Location: _____</p> <p>Hours of Workshop: _____</p> <p>Presenter Name: _____</p> <p>Presenter Qualifications (Job Title, Employer, Education, etc.) Include bio as attachment if available: _____</p> <p>_____</p> <p>Sponsoring Organization: _____</p> <p>Contact Person: _____</p> <p>Phone: _____</p> <p>Email: _____</p>
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3. Attachments:

- **Copy of Workshop Announcement (i.e. brochure, flyer, email, website link)**
- **Biography/Resume of Presenter**

4. Indicate the topic(s) that apply to this session by listing the number of hours for each topic. *Reminder: To complete the Nonprofit Fundamentals Core Area, 5 hours in each category is required.*

Category 1

Legal Organization	# of Hours
IRS Nonprofit Status	_____
Local, State, Federal Guidelines	_____
Advocacy & Lobbying	_____
Public Policy	_____
Other (please specify)	_____
_____	_____

Category 2

Organizational Design and Infrastructure	# of Hours
Self-Assessment	_____
Staffing vs. Volunteer Management	_____
Standards of Excellence	_____
Ethics	_____
Other (please specify)	_____
_____	_____

5. Describe how this session meets the requirements for the Nonprofit Fundamentals Category (3-4 sentences).

Certificate Participant Signature

Date

BOARD OF DIRECTORS/GOVERNANCE WORKSHOP APPROVAL FORM

1. Certificate Participant Information

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3. Attachments:

- Copy of Workshop Announcement (i.e. brochure, flyer, email, website link)
- Biography/Resume of Presenter

4. Indicate the topic(s) that apply to this session by listing the number of hours for each topic. *Reminder: To complete the Board of Directors/Governance Core Area, 5 hours in each category is required.*

Category 1

Board Self Governance	# of Hours
Roles/Responsibilities of Board Members	_____
Legal Issues and Nonprofit Boards	_____
Competencies of Effective Boards	_____
Recruitment/Training/Evaluation	_____
Committee Structure and Boards	_____
Other (please specify)	_____
_____	_____

Category 2

Board Operations	# of Hours
Board Relationships with Staff	_____
Effective Board Meetings	_____
Visioning and Strategic Planning	_____
Board Role in Fundraising	_____
Communication Strategies	_____
Other (please specify)	_____
_____	_____

5. Describe how this session meets the requirements for the Board of Directors/Governance Category (3-4 sentences).

Certificate Participant Signature

Date

HUMAN RESOURCE DEVELOPMENT WORKSHOP APPROVAL FORM

1. Certificate Participant Information

<p>Certificate Participant: _____</p> <p>Contact Information:</p> <p style="padding-left: 40px;">Phone: _____</p> <p style="padding-left: 40px;">Email: _____</p> <p style="padding-left: 40px;">Address: _____</p>
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3. Attachments:

- Copy of Workshop Announcement (i.e. brochure, flyer, email, website link)
- Biography/Resume of Presenter

4. Indicate the topic(s) that apply to this session by listing the number of hours for each topic. *Reminder: To complete the Human Resource Development Core Area, 5 hours in each category is required.*

Category 1

Employment Law	# of Hours
Hiring/Firing	_____
Personnel Policies	_____
Discipline	_____
Performance	_____
Other (please specify)	_____
_____	_____

Category 2

Management	# of Hours
Leadership Skills	_____
Conflict Resolution	_____
Coaching	_____
Team Building	_____
Delegating	_____

Providing Feedback	_____
Motivation Strategies	_____
Other (please specify)	_____
_____	_____

Category 3

Volunteers	# of Hours
Recruitment	_____
Training	_____
Retention	_____
Recognition	_____
Planning/Development	_____
Volunteer Positions	_____
Risk Management	_____
Other (please specify)	_____
_____	_____

5. Describe how this session meets the requirements for the Human Resource Development Category (3-4 sentences continue on back if necessary).

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RESOURCE DEVELOPMENT WORKSHOP APPROVAL FORM

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- Biography/Resume of Presenter

4. Indicate the topic(s) that apply to this session by listing the number of hours for each topic.

Category 1

Grant Writing	# of Hours
Grant Research	_____
Proposal Writing	_____
Grant Reporting	_____
Other (please specify)	_____
_____	_____

Category 2

Financial Resource Development	# of Hours
Special Events	_____
Planned Giving	_____
Direct Fundraising Appeals	_____
Entrepreneurial Ventures	_____
Other (please specify)	_____
_____	_____

Category 3

Special Topics in Resource Development	# of Hours
Donor Identification, Cultivation, Relations	_____
Resource Development Planning	_____
Ethics in Resource Development	_____
Capital Campaigns	_____
Other (please specify)	_____
_____	_____

5. Describe how this session meets the requirements for the Human Resource Development Category (3-4 sentences).

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FINANCIAL MANAGEMENT WORKSHOP APPROVAL FORM

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3. Attachments:

- Copy of Workshop Announcement (i.e. brochure, flyer, email, website link)
- Biography/Resume of Presenter

4. Indicate the topic(s) that apply to this session by listing the number of hours for each topic. *Reminder: To complete the Financial Management Core Area, 5 hours in each category is required.*

Category 1

The Annual Accounting Cycle	# of Hours
Nonprofit Bookkeeping	_____
Financial Statements	_____
Financial Control	_____
Financial Reporting	_____
Other (please specify)	_____
_____	_____

Category 2

Activities in the Annual Accounting cycle	# of Hours
Preparing the Operating Budget	_____
Managing the Operating Budget	_____
Financial Audits	_____
Analysis of Budget Deviation	_____
Cash Flow analysis	_____
Financial Statement Analysis	_____
Other (please specify)	_____
_____	_____

Category 3

Special Topics	# of Hours
Lease vs. Buy	_____
Investment Administration	_____
Break-Even Analysis	_____
Fiscal Stress Ratios	_____
Other (please specify)	_____
_____	_____

5. Describe how this session meets the requirements for the Financial Management Category (3-4 sentences).

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SERVICE PROVISION WORKSHOP APPROVAL FORM

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3. Attachments:

- Copy of Workshop Announcement (i.e. brochure, flyer, email, website link)
- Biography/Resume of Presenter

4. Indicate the topic(s) that apply to this session by listing the number of hours for each topic. *Reminder: To complete the Service Provision Core Area, 5 hours in each category is required.*

Category 1

Program Development	# of Hours
Community Needs Assessment	_____
Strategic Planning	_____
Other (please specify)	_____
_____	_____

Category 2

Program/Organizational Design & Evaluation	# of Hours
Target Populations	_____
Collaborations	_____
Evaluation	_____
Outcome Measurements	_____
Program Evaluation	_____
Non-Financial Audits	_____
Self-Assessment	_____
Impact on Budget	_____
Other (please specify)	_____
_____	_____

Category 3

Rural Community Service	# of Hours
Access and Availability	_____
Ethics	_____
Special Considerations	_____
Other (please specify)	_____
_____	_____

5. Describe how this session meets the requirements for the Service Provision Category (3-4 sentences).

Certificate Participant Signature

Date

SPECIAL TOPICS/ELECTIVES WORKSHOP APPROVAL FORM

1. Certificate Participant Information

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- Copy of Workshop Announcement (i.e. brochure, flyer, email, website link)
- Biography/Resume of Presenter

4. Indicate the topic(s) that apply to this session by listing the number of hours for each topic. *Reminder: To complete the Special Topics/Electives Category, a minimum of 4 different workshops with a total of 20 hours is required.*

Special Topics	# of Hours
Marketing/Media	_____
Technology	_____
Social Entrepreneurship	_____
Emerging Topics	_____
Public Speaking	_____
Facilities Management	_____
Capital Campaigns	_____
Other (please specify)	_____
_____	_____

5. Describe how this session meets the requirements for the Special Topics/Electives Category (3-4 sentences).

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Date