

IntegralOrg



2022 Workshops



INTEGRALORG
Your mission is ours

IntegralOrg helps Alberta nonprofits and charities thrive through education and support. We offer a comprehensive suite of services that build organizational capacity such as one-on-one clinics, workshops, in-depth training, organizational development projects, and practical toolkits, all designed to help your nonprofit take care of fundamentals so that you can focus on mission.

IntegralOrg is a proud nonprofit charity.

IntegralOrg offers a series of capacity-building workshops on **organizational fundamentals** for nonprofits.

Our presenters **customize** each workshop to meet the particular needs of the group. Presenters also apply the lens of emerging environments such as the COVID-19 pandemic, changing regulations, and sector trends.

If you don't see the workshop you need, contact us! We're happy to work with you to create one that fits your needs.



Contact us:

www.IntegralOrg.ca
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P: 403-910-7279
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Principles of governance for nonprofits and charities

Understanding the principles of governance is integral to the smooth and effective running of any nonprofit or charitable organization. No matter the size or scope of your organization, taking the time to make sure the board is engaged and aligned is critical. Our Principles of Governance workshop incorporates three interconnected areas of responsibility – fiduciary, strategic, and generative – and the board’s role in focusing on the entire organization and working together as a whole.

This session will include:

- Principles of good governance and the foundations of working together as a board.
- Clarifying the roles and responsibilities of individual board members and the board as a whole including understanding three interconnected areas of responsibility for boards – fiduciary, strategic, and generative responsibility.
- Understanding the role of the senior executive, and the differences between board and staff and how they work with each other.



IntegralOrg often partners with community organizations, municipalities, regional organizations, and nonprofit-supporting organizations across Alberta to offer individual workshops or a training series. If you would like to partner with us to support nonprofits and charities in your area, please contact us.

Keeping your nonprofit or charitable organization healthy

Is your organization a nonprofit, society, or charity operating in Alberta? Do you have questions about your objects, activities, or charitable purposes? This session will help you understand the requirements your organization must meet under legislation.

This session will include:

- Governance responsibilities
- Charity legal compliance
- Nonprofit legal compliance
- CRA compliance (reporting, receipting, other CRA policies)
- GST compliance



Legal basics of social enterprise for nonprofits and charities

Social enterprise is one of the options to help Canadian nonprofits and charities improve their financial sustainability. Is your organization interested in (or has already started) a social enterprise? This session provides an overview of the legal regulations on social enterprises imposed by the Income Tax Act, CRA-related business rules for charities, and the most common nonprofit statutes (Societies Act, Companies Act, CNCA), for nonprofits and charities operating in Alberta. Examples of real-life social enterprise models will be discussed.

Bringing your budget to life

Budgeting for organizational success can be puzzling to many organizations. Join IntegralOrg for this workshop designed to help nonprofit and charitable staff and boards be on the same page when budgeting.

This session will include:

- Planning before creating a budget
- Basic terminology
- Different budget categories
- Monitoring the budget and taking action
- Identifying good budgeting practices and budgeting pitfalls
- Understanding and managing your reserve fund
- Available resources to assist organizations in the budgeting processes

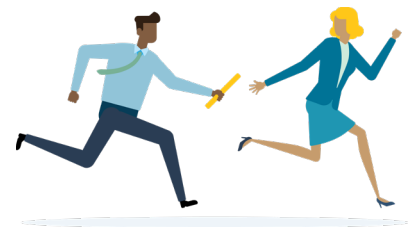


Succession planning for nonprofits

One of the most challenging and important transitions for any nonprofit or charitable organization is a change in senior leadership. Whether it is a succession that has been long anticipated or one that has arisen unexpectedly, it is critical that organizations are prepared with how to respond in the interim and what they need in a leader in the long term.

This session will include:

- The impacts of an unexpected departure of a senior staff member
- Understanding the roles the board, staff, and external stakeholders might play in the process, and which pitfalls to avoid
- What a transition timeline should look like in advance of the transition
- The policies and procedures that should be in place for handling both planned and unanticipated transitions
- Working through the tough questions that come with a transition process



Introduction to risk management for nonprofits

The landscape that nonprofit organizations operate within is changing dramatically and rapidly. As leaders, how can we identify, prepare for, manage, and leverage the risks that we are facing that are interfering with our ability to fulfill our mission?

How do you engage staff and Board in meaningful discussions around risk; both the threats facing your organization and the exciting opportunities that require bold but risk-informed decision-making? What does a risk-aware organizational culture look like?

Join us in this session for a high-level overview of risk management for nonprofits, and a brief demonstration of IntegralOrg's new Risk Management Toolkit, a free, interactive online tool to help organizations track and monitor progress in the development of best practices and proactive risk management strategies.



Our presenters



Mike Grogan

Mike Grogan is President & CEO of IntegralOrg. Mike is recognized for his ability to inspire nonprofit organizations to tackle complex issues and create effective and sustainable solutions to organizational and community issues. His skills and experience stem from a diverse background that encompasses leading backcountry wilderness trips, building organizations from the ground up, and developing leading-edge collaborative and capacity-building initiatives. Mike's passion is helping organizations understand the ever-evolving ecosystem and working with organizational teams to build capacities to respond and adapt to a changing environment. From program lifecycle analysis, to change management, and sector network development, Mike has worked with diverse stakeholders to design programs and systems to meet the changing needs of nonprofit organizations and of the nonprofit sector.



Yvonne Chenier, QC

Yvonne is a lawyer with over 35 years of experience helping those in the philanthropic, nonprofit and social enterprise sectors, acting as general legal counsel and advising on planning, organizational, regulatory and governance matters. She is a co-founder and legal counsel for IntegralOrg.

Yvonne has served as a trustee, board member, or founder of numerous organizations and speaks frequently to various groups on topics ranging from legal to financial matters. Yvonne is an active member of the Charities and Not-For-Profit Section of the Canadian Bar Association years and is a past Chair. Her articles have been published in numerous publications including Canadian Taxpayer, the Not-for-Profit News, Charity Talk, Tax Times, Taxnet Pro, Canadian Fundraising & Philanthropy, Hilborn Charity eNEWS and LexisNexis Practice Advisor. Yvonne is named in The Canadian Legal Lexpert® Directory* for excellence in Charity Law and has been selected by her peers for inclusion in The Best Lawyers in Canada for her work in Charities/Non-Profit Law.



Betty Thompson, FCPA, FCGA

Betty is a chartered professional accountant and co-founder of IntegralOrg. She has over 10 years experience as an entrepreneur and 30 years experience serving Calgary's nonprofit sector. Betty has a practical understanding of the opportunities and difficulties that nonprofits face in today's economic climate. Through IntegralOrg, Betty offers coaching services in governance and policy development, and financial and management related issues.

Practicing what she is passionate about, Betty is an extremely active member of Calgary's nonprofit community as a board member and service volunteer. She is on the board of the Aero Space Museum Association of Calgary and a member of the Audit and Finance Committees of the Calgary Chamber of Voluntary Organizations and Agriculture for Life.