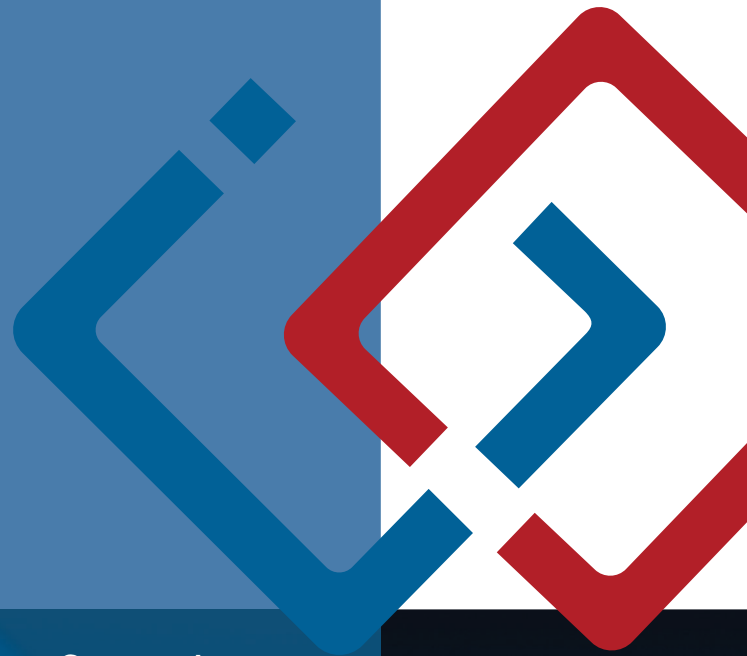


IntegralOrg



Workshops





IntegralOrg helps Alberta nonprofits and charities thrive through a comprehensive suite of services that build organizational capacity. We offer education and support in foundational areas like governance, legal compliance, financial management, strategic planning, change management, and risk management.

We problem-solve with organizations through workshops, one-on-one clinics, and in-depth organizational development projects.

IntegralOrg is a proud nonprofit charity.



Contact us:

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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, for example, the COVID-19 pandemic.

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.



Some examples of customized workshops:

- From Response to Recovery: Managing a Nonprofit Organization in Uncertain Times
- Virtual AGMs and Bylaws in the Time of COVID-19
- Financial Management for Faith-Based Organizations
- Building a Sustainable Nonprofit Business Model
- OHS Through a COVID-19 Lens

Introduction to strategic planning

Leading a nonprofit or charitable organization in today's rapidly changing environment can be challenging, as is navigating a route forward when much of the world we know is shifting and the future remains uncertain.

Strategic planning processes enable organizations to understand their current and past operating states, create a vision for the future, and determine what steps they should take to achieve that vision.

In this interactive virtual session, we will introduce participants to the concepts of traditional strategic planning as well as tools to use in an emergent and uncertain environment.

Topics include:

- Presenting tools and processes to better understand an organization's current capacities and develop an understanding of the external trends and forces that will impact them moving forward
- Laying out the process for taking a broad vision to a coherent strategy with well-defined objectives and a plan of activities
- Gaining a greater understanding of the components of the cycle of strategic planning and how to adapt these within a rapidly changing environment
- Developing approaches to keep strategy front and centre, and building ownership throughout the organization



Scenario planning for nonprofits

Crafting strategy is difficult in times of uncertainty. As both the number and significance of unknowns increases, the length of time for strategies to be effective decreases.

In scenario planning, we ask the question: “What might we need to do?” not “What will we do and how will we do it?” Scenario planning is about generating options and insight, not actions and plans.

Scenario planning helps your organization envision variations of what the future may hold, identify some of the critical uncertainties it faces, and think through the possible impacts and our responses to them.

It is a creative, shared process that helps us make sense of an uncertain future with a focus on making better decisions. If we are aware of what could happen, we are more able to deal with what does happen.

Topics include:

- An introduction to scenario planning concepts and processes
- Determining your organization’s focal question
- Identifying drivers of change and critical uncertainties
- Crafting scenarios
- Using the scenario matrix
- Surfacing implications, ideas, and next steps for your organization



Effective budgeting for nonprofit organizations

This workshop focuses on the annual budget cycle for nonprofit organizations from planning to monitoring and taking action.

The workshop includes discussions and examples to demonstrate the process and provide practical learning.

We will cover:

- The process of creating a budget
- Different types of budgets
- Budgeting terminology
- Budget categories
- Good budgeting practices
- Budgeting pitfalls
- Monitoring and follow-up

Finance 101

Are you comfortable reading and understanding your financial statements? Are you confident that your financial management policies, including internal controls, are strong?

This workshop is a great opportunity to help define roles and responsibilities in financial management at your organization and make sure you are compliant with CRA requirements.

We will cover:

- What is financial management?
- Roles and responsibilities related to finance at the staff and board levels
- How to read financial statements
- Efficient budgeting
- Internal controls
- Contractor versus employee

Bringing your budget to life

Join IntegralOrg for this workshop designed to help staff and boards of nonprofits be on the same page as they budget for organizational success!

We will review:

- Planning before creating a budget
- Setting the stage – basic terminology
- Different budget categories: Including Operating vs. Capital, and developing your program and funder budgets
- 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

Fundraising essentials

Is fundraising an essential part of your organization's revenue? Are you confident that your fundraising practices and policies are compliant with legislation? This workshop explains what you need to do to be compliant and build strong, stable, and practical fundraising practices.

We will cover such topics as:

- Accepting gifts and donations
- Stewarding donors
- Appropriate use of funds
- Canadian Anti-Spam Legislation (CASL) compliance
- Provincial and CRA fundraising requirements

A woman with short blonde hair, wearing a blue blazer over a white top and a necklace, is gesturing with her right hand while speaking. She is standing in front of a group of people who are seated and looking towards her. The background is a bright, out-of-focus interior space.

Keeping your nonprofit healthy

Is your organization a nonprofit or society operating in Alberta? Do you have questions about your objects, or issues around financial or legal compliance? This workshop will help you understand the requirements your organization must meet under legislation. This session is of interest to board members, management, staff, and volunteers.

We will cover:

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

Living your charitable purposes

Is your organization a registered charity? Do you need to better understand the activities that you are carrying out and how they align with your charitable purposes? Do you need a refresher on what your charitable purposes are and how they apply both at the governance and management levels of your organization?

We will cover:

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

Occupational health and safety

The COVID-19 pandemic has brought a new urgency to nonprofit organizations to understand and comply with Alberta Occupational Health and Safety (OHS) legislation.

OHS legislation was overhauled in 2018 and revised again in 2019/2020, setting new standards that all employers – including those in the nonprofit sector – must comply with.

This workshop provides an overview of the recent legislation changes and an intro to our online toolkit to facilitate getting your organization on the right track with OHS processes, policies, and a safer workplace.

Objects and bylaws: govern yourself accordingly

Living your objects and loving your bylaws is one of the keys to a healthy organization. What is behind an organization's objects and bylaws? What are the differences and what are the limits of these important tools?

Learn about the integral wording for these documents and try your hand at creating a new object and bylaw clause for your organization.



Advocacy and lobbying

Does your organization advocate on behalf of the community you serve? Do you communicate with various levels of government? Recent changes in lobbying legislation may impact your organization! Join us for this workshop to explore the application of lobbyist legislation and how recent policy and advocacy developments affect you.

We'll cover topics such as:

- What is lobbying?
- What is the lobbyist registry?
- When and why would our organization need to register?
- Who is exempt?
- The Canada Revenue Agency's 2018 guidance document on Public Policy Dialogue and Development Activities (PPDDA)
- Highlights of the applicable lobbying legislation
- Legal obligations for in-house or organization lobbyists

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.



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.

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, a registered charity focused on advancing the knowledge of registered charities and nonprofit organizations by training and coaching boards, management and volunteers to carry out their organization's mission.



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.



Mike Grogan

Mike Grogan is the President and CEO of IntegralOrg. Mike has worked in the nonprofit sector for over 25 years and is recognized for his ability to create effective and adaptive solutions to organizational and community issues. His skills and experience stem from a diverse background that encompasses building organizations from the ground up to developing leading-edge nonprofit collaborative, public policy, and capacity building initiatives and leading backcountry wilderness adventures.