



## CUSTOMIZED BOARD TRAINING FOR NONPROFITS

### Summary of Services

The Sorkin Center at Compass offers a team of experts who work with your Executive Director and Board Chair to create a customized training for your board in one of the following areas:

- **Finance** - Compass uses your organization's financials to explain the basics of nonprofit finance to your board. The training addresses topics such as how nonprofit financials differ from for-profit financials, financial stewardship, accounting for grants, nonprofit cash flow, the Form 990 and Audited Financials, and risk management including policies, insurance, fraud, and internal controls.
- **Fundraising** – The Fundraising training focuses on making this critical responsibility of a nonprofit board more accessible and less scary for board members. Topics include board member giving, tips to help board members fundraise, understanding why donors contribute, and telling your nonprofit's story. Compass will concentrate on the source(s) of funding most relevant to your organization.
- **Governance** – Governance training is customized based on your type of board and where your organization is in its evolution. Topics can include the foundations and characteristics of good governance, the role of a nonprofit board versus staff, the responsibilities of the organization to board members, and the role of committees.
- **Executive Director and Board/Board Chair Working Relationship** – The relationship between the ED and the board and Board Chair is critical to the success of any nonprofit. This session helps EDs and Board Chairs understand their respective responsibilities, as well as best practices for a productive working relationship.

Each training runs for 60 - 90 minutes and is led by one of Sorkin's leaders with knowledge and expertise on the desired topic. The goal of these training sessions is to provide your board with a deeper understanding, knowledge and insight of the topic at hand, as well as to enable the board to identify organizational blind spots. Board trainings build and facilitate stronger board ties with the nonprofit leader, Board Chair and board members. In some cases, nonprofits invite staff members to join the training, which can ensure all relevant parties have a common understanding of important issues.

## What is the Process for a Customized Sorkin Training?

Once the Executive Director and Board Chair agree on the topic, the Sorkin trainer will meet with the ED and Board Chair to determine logistics including attendees (board and/or staff), understand goals, and agree on an agenda. Often, nonprofits choose to include the Sorkin training in an already scheduled board meeting or as part of a board retreat. In most circumstances, the nonprofit will want to provide specific data to the trainer to ensure maximum customization. The type of data required will depend on the training topic, but can include any of the following:

- Financial Statements
- Fundraising and Revenue Materials
- Staff Organizational Chart
- Board Member Bios
- Board Meeting Documents and Materials
- Board By-laws

## What is the Cost of a Board Training?

The cost of each customized board training is \$1,000 per topic, or \$2,500 for three trainings on the same day, often as part of a board retreat. This includes a planning meeting with the trainer, a 1 - 1.5 hour training per chosen topic(s,) and a post training survey of attendees.

## How is a Sorkin Customized Board Training Different from the Sorkin Summit?

The Sorkin Summit is an annual training for both new and experienced nonprofit board members that brings together board members from many boards. The annual Summit is held in May each year with approximately 100 attendees. The Summit is led by Sorkin Center experts, along with nonprofit board members and staff leaders, who cover the major components of serving on a nonprofit board. The purpose of the Sorkin Summit is to provide a holistic introduction to the fundamentals of a high impact board and to serve as a convening opportunity for board members from diverse geographic areas, sectors, and missions. The cost for the Summit is \$95 per person.

Sorkin's customized trainings are a deeper, more concentrated dive into a specific topic only for board members from a specific nonprofit board. The training can serve to build community within the board as Sorkin seeks to create connection points regardless of the training topic.

## Contact Sorkin Center

If you would like to schedule a training or learn more about Sorkin Center offerings, please contact Sorkin Center Executive Director Amy Cress at (773) 396-674 or [acress@compassdc.org](mailto:acress@compassdc.org).

## About The Sorkin Center at Compass

The Sorkin Center for Nonprofit Governance provides unique board training programs and services for nonprofit boards. As part of Compass, the Sorkin Center builds on Compass' years of experience and expertise in the local nonprofit sector.

The Sorkin Center houses Compass' On Board program, which matches business professionals onto nonprofit boards. Additionally, the Sorkin Center offers Retreat Facilitation and Strategic Planning services for nonprofits.