

Our 2024 Board Governance Training Package for individual nonprofit or charity boards.



A) TESTIMONIALS

- "Fantastic material ! Thanks so much for your time and energy, the board has really enjoyed your work with them and I think this will go a long way in strengthening the strong board we have. I am so appreciative of your expertise and professionalism". **Terry Caporossi, Executive Director, Alzheimer Society Sault Ste. Marie & Algoma District**
- "The session was excellent. I really appreciated your high energy, mixing in fun and active things throughout the day, reinforcing critical points from different angles." **Ian Frazier, Board Vice Chair, Algoma Public Health**
- "Thank you again for your invigorating Board best practices session yesterday. I'll now say that I got my undergraduate degree in Board Governance through the Institute of Corporate Directors, and my graduate degree in attending your session on Best Practice Board Governance." **David Wexler – Board of Directors of CancerCare Ontario, Board of Directors Vaughan Community Health Centre, and Advisory Board for The School of Human Resources at George Brown College.**
- "David's presentation was helpful and informative. Having spent a significant amount of time learning about best practices for governance in the past I know that this is typically a very dry topic. Thankfully, David provided a dynamic and engaging review of the issues facing charitable board in the health care setting. His knowledge was impressive. He encouraged interaction without pressure. He called us out and pushed us ahead in reviewing our structure of meetings and the board. To put things simply: I left the presentation feeling that my time, which I value highly, was well spent." **Nathan Baker, Barrister & Solicitor, Aitken Robertson, Federation of Ontario Law Associations Board**
- "Thank you for your expertise and insight, David. We accomplished an amazing amount in a limited time because of the care you took to understand our organization beforehand. Your ability to synthesize information into manageable chunks was delivered with honesty and compassion." **Jane Simpson, Executive Director, Arts & Culture Centre, Sussex, N.B.**
- "David will take you and your group through action-packed discussions on board governance, risk management and leadership, while building your team together at the same time. He encourages everyone to be courageous and gracious, and challenges individuals to think big." **John Burton, Regional Director for Atlantic Canada, Boys and Girls Clubs of Canada**
- "David's dynamic, energizing, down to earth and practical style is refreshing! He has remarkable knowledge surrounding Good Governance and Risk

Management and the ability to transfer knowledge in a very meaningful and impactful way. We now have some great strategies that will move us forward.” **Sharon Pitawanakwat, CEO, Canadian Mental Health Association, Thunder Bay, Ontario**

- “David is a highly gifted trainer and consultant on the topics of risk management, governance and nonprofit management. David has an in-depth knowledge of these topics, and perhaps more importantly, a true gift for sharing this knowledge with others in a way that is practical, helpful, dynamic, engaging and immediately useful for nonprofit organizations both large and small. We’ve engaged David for both face-to-face workshops and online webinars and his engaging and informative presentations have always been extremely helpful and in fact have transformed how we assess risk and governance in our nonprofit organization. Somehow, David makes dry and daunting topics manageable, practical and engaging! Now, that’s a gift!” **Joanne Kaattari, Executive Director, Community Literacy of Ontario**
- “David immediately demonstrated deep insight, understanding and wisdom. He listened carefully, asked important questions and was able to raise critical considerations for us to deliberate on. His genuine concern for the well-being of our organization was clear from the very beginning. His passion for his work is obvious. His ability to carry out frank conversations helped our board tackle important issues. I was thoroughly impressed with David’s character, competence, deep knowledge and expertise, and commitment to the best interest of our organization. I would not think twice to hire him again for any future consulting needs.” **Nabil Sultan, Board Chairman, Muslim Association of Canada.**
- “David is an expert in his field and is able to bring all concepts to life with his abundance of real life examples. Participants continually comment on his engaging style and wealth of knowledge. David is extremely professional and a pleasure to work with!” **Janet Davidson, Town of Milton, Ontario**
- “I wanted to thank you and let you know that I, along with many others, was extremely impressed with your presentations. It is easy to understand why you are consistently being asked to consult with non profits across the country.” **Scott Furman, Director of Operations, Hockey Manitoba**
- “David is an outstanding trainer with strong knowledge of risk management, governance and insurance issues in the charitable and nonprofit sector. If you are looking for someone to train a large or small group on these topics, I highly recommend David.” **Cathy Barr, Senior V.P., Imagine Canada**
- “As someone new to the E.D. world, I really benefited from your practical information and will be mining it for many days to come !” **Joel Dennis, Tremplon, Charlottetown, P.E.I.**

B) DAVID HARTLEY: WORK BACKGROUND

1. **For-Profit Risk:** David spent almost a decade in the for-profit world of risk and insurance, including over 7 years training insurance brokers, primarily for two of Canada's largest property & casualty insurers: the Co-operators and Aviva.
2. **Not-for-Profit/Charity Risk:** In 2007, David joined the national charity Imagine Canada, whose mission is to strengthen Canadian nonprofits and charities (www.imaginecanada.ca), and became the Director of their Insurance & Liability Resource Centre for Nonprofits. The Centre was a 5-year funded project of the Government of Ontario and David was with the Centre from the beginning to its completion in 2012.
3. **Not-for-Profit/Charity Consultant:** From 2012 – Present (2024), David has worked full-time running his own consultancy (www.nonprofithelp.ca). The bulk of his energy is spent on strategic planning, board governance and risk management, and always with national, provincial or local nonprofits and charities across Canada.

Education: David graduated with an Honours bachelor's degree in Sociology and History after 4 years at York University / Redeemer College. He also has his Canadian Risk Management (C.R.M.) designation from the University of Toronto. He also is certified to train John Maxwell's leadership material (founding member of John's training team).

David has assisted hundreds of nonprofits and charities in over 200 Canadian towns, training over 25,000 leaders.

C) BOARD GOVERNANCE TRAINING PACKAGE:

What is included in the training package:

1. Confidential, online Board survey. David uses this to help understand the current condition of your charity or nonprofit Board. We provide you a summary document of the survey results. The survey takes on average 20 minutes online to complete for each participant.
2. Approximately 2 hours of preparatory virtual calls with the Executive Director (at least 30 minutes of this with the Board Chair if possible) to help David to customize his training material for your Board's realities. We will discuss the current state of the Board and all of your current committees (Board and Operations). Note: David will need a copy of your current bylaws and any board governance materials you currently use.
3. Board training (virtual or In-person) session. Options: 3 hour session (board best practice training) OR 6 hour session (for boards wanting additional assistance).
4. PDF of our customized training resource "Creating & Maintaining a Thriving Nonprofit Board" (approximately 80-100 pages) and several other documents dependant on our needs assessment.
5. Our 2 board excel template samples: (1) Strategic Plan board dashboard; and (2) Risk Management board dashboard. I believe these are the two most critical documents for a board to monitor over time. These dashboards show how simply (and colourfully) this can be done.

D) BOARD GOVERNANCE PACKAGE FEE:

- **Option 1:** Nonprofit board best practice training by Zoom (2 sessions X 90 minutes each with Q&A): **\$2,700** for most organizations. Scroll down our training page online for details.
- **Option 2 (far preferred):** 3 hour In-Person Nonprofit board best practice training : **\$3,200** for most organizations (if within 2.5 hours drive time from Pickering, ON). *Note: David has assisted nonprofits/charities in over 200 Canadian towns in every province and territory (except Nunavut). Fee is based on total travel time. Add GST/HST and actual travel costs. Email us for exact fee.*
- **Option 3:** 6 hour In-Person day (training and planning) for boards needing additional assistance. Weekends available.
- **Option 4:** Multi-board training. Choice A: you host a training for multiple nonprofit/charity boards for 6-hour day. Choice B: you host a training for multiple boards for 3 hour morning with the afternoon focused on your board alone. Email for more detail.

Thank you for giving us the opportunity to provide this proposal.
Please let me know if you have any questions.

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