

NONPROFIT BOARD TRAINING: CREATING & MAINTAINING AN ENERGIZED & FOCUSED BOARD



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. **JOANNE KAATTARI, EXECUTIVE DIRECTOR, COMMUNITY LITERACY OF ONTARIO**

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, VAUGHAN COMMUNITY HEALTH CENTRE, AND ADVISORY BOARD FOR THE SCHOOL OF HUMAN RESOURCES AT GEORGE BROWN COLLEGE.**

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. His knowledge was impressive. He encouraged interaction without pressure. His blunt style 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. BOARD MEMBERSHIP: (1) FEDERATION OF ONTARIO LAW ASSOCIATIONS, (2) PETERBOROUGH FAMILY HEALTH TEAM, (3) RUGBY ONTARIO**

I have served on 2 national boards (the Canadian Red Cross Society and the Girl Guides of Canada) along with other foundations and local boards. I've attended numerous governance training sessions over the past 20 years including 3 full days training with John Carver (the Carver Model). Still I got so much more out of David Hartley's session today. Simply superb! **KATHLEEN (KAY) THOMSON, PRESIDENT OF THE GOOD NEIGHBOURS ACTIVE LIVING CENTRE, WINNIPEG**

David is very engaging, has tremendous knowledge and builds a relaxed atmosphere. **DAVE WATSON, BOARD CHAIR, GOODWILL, SARNIA-CHATHAM**

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**

WHO IS DAVID?

David Hartley would love to facilitate your next Board Retreat. David has trained hundreds of Boards, over 28,000 Canadian nonprofit staff and board members, in 220 Canadian towns as of 2026. His full bio and over 200 references at www.nonprofithelp.ca



LET'S FIND A DATE
EMAIL david@nonprofithelp.ca

↓ SCROLL DOWN TO SEE THE PACKAGE ↓

THE 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.



BOARD GOVERNANCE PACKAGE FEE:

OPTION 1 (2026):

Nonprofit board best practice training by Zoom (2 sessions X 90 minutes each with Q&A):

\$3,150 for most organizations. Scroll down our training page online for details.

OPTION 2 (FAR PREFERRED) (2026):

3 hour In-Person Nonprofit board best practice training:

\$3,650 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.



FEE: Includes prep work by phone to customize the session to your needs and PDF full resource pack for each Board member. Please find our current fees at this web page: nonprofithelp.ca/training

SAMPLE TOPICS

- **2 Roles & 7 Goals** for nonprofit Boards regardless of the size of your nonprofit
- **How to hold engaging,** truly impactful Board Meetings
- **Great Agendas** (including a simple tip that revolutionizes engagement levels)
- **Long-term Direction:** Strategic Planning (Board's role & using a 1-page-per-year "dash board")
- **Long-term Protection:** Fiduciary Duties (Board's role & how to create a "risk map")
- **4 Steps to Protect Your Board from Legal Liability** - David spent 7 years training Insurance Brokers
- **Practically keeping Operations and Governance Separate:** Nose In, Fingers Out
- **Building & Maintaining Trust & Unity** ... with great debate!
- **Managing Stars, Steadies, Strugglers on the Board** (including best practice "boardroom rules")
- **Helpful simple** (Canadian) ways for the Board to help an organization financially
- **Separating** "major" from "minor" issues
- **What makes** a strong Chair
- **Strong "committees"** (long-term vs. Task forces)
- **Critical** by-laws and Board policies
- **Minutes done well** (easier, shorter and risk-wise)
- **Ensuring** you "hire" the right people to your Board (skills matrix)
- **David's favourite** Annual Evaluation (confidential, not anonymous)

