



5BC Presents: Lead With Confidence Intensive Cohort Series

This series covers the most important aspects of running an organization in a biweekly interactive IN-PERSON 5-part cohort series. This series has been developed around an Organizational Diagnostic Tool with each topic addressing a specific section of the Tool. The intent is to help build the management skills of newer ED's and give them solid, foundational information about how to run a sustainable, effective, and thriving organization. This training is facilitated by Katie Davis of 5 Branches Consulting LLC.

Cohort Series Goals:

- Gain a comprehensive skill set in many topics related to running an effective organization.
- Have access to a wide range of organizational development tools.
- Gain credibility with funders (completing the certificate being seen by funders as evidence of a focused and well-managed organization).

About Katie Davis (She/Her/Hers)

5 Branches Consulting was founded by Katie Davis in 2011 emerging from a desire to support capacity building needs across multiple nonprofit sectors. She currently resides near Salida, Colorado but spent nearly a decade (2011-2020) in the Pacific Northwest living in Bend and Portland, Oregon and Port Townsend and Bainbridge Island Washington.

Katie has over twenty years' experience in systems and process improvement, fundraising and strategic visioning. Katie holds a certificate in Nonprofit Management and is a Society for Human Resources (SHRM-CP) certified professional. She has dedicated her entire career to helping organizations and businesses across multiple sectors achieve impact while remaining resilient during challenging times. From the smallest of nonprofits to large businesses and corporations, Katie's unique approach to achieving organizational effectiveness - developing a collective strategy, achieving financial success, establishing equitable and inclusive management processes and policies, and developing and supporting collective leadership - means she can hold the larger vision while breaking down processes into achievable and incremental steps. Katie brings a level of play and humor to problem solving and planning reflected in her unique facilitation agendas.

Katie sits on multiple boards both nationally and internationally. She spends her free time exploring the mountains of Colorado and serving her community as a local elected member of the town council.

Education:

- Society For Human Resources Certified Professional (SHRM-CP)
- Certificate of Nonprofit Management from University of Washington
- Master of Science, Recreation, Parks and Tourism Administration, Western Illinois University
- Bachelor of Science, Biology and Sociology, Principia College

**Cohort Size:**

- Maximum 10 organizations
- Teams of 2 welcome to join for additional fee (staff, board, key volunteers)

Program Dates/Times:

- Wednesdays 4:00pm-5:30pm
- 1/24, 2/7, 2/22, 3/6, 3/20

Location and Cost:

- Sessions are 90 minutes and will be held **IN PERSON** and **VIRTUALLY**
- Chaffee, Lake and Fremont County Organizations - \$325 per person (add a second person from the organization for \$100)
 - The fee includes one 60-minute confidential consulting session with 5 Branches Consulting on any Executive Director topic/need.
- Out of Area Price - \$425 per person (add second person from organization for \$100)

Session Descriptions**Session 1: Assessing Your Organization: The Organizational Diagnostic Tool**

Every organization has strengths and vulnerabilities, and many leaders are too close to the situation to see these clearly. In this session, we introduce a simple assessment tool that allows you to see how you rank on key indicators in three areas: Programs, People, and Money. This Organizational Diagnostic Tool can yield great benefits by helping to identify areas of need and then charting a course to a more robust strategy and better performance.

Session 2: Taking the Mystery out of Financial Management

In this session, we will walk through the various components of financial management and true to its name, remove the mystery from financial management. We will focus on solid financial reporting and budgeting. Having a clear budget that is broken out by programs is a foundational element to an organization's financial sustainability. We will share a Program Based Budget template and instructions on how to use it.

Session 3: Beyond Strategic Planning: Maximizing Your Impact as an Organization

In this session, we'll explore the range of planning and management approaches and tools that an organization should consider. We'll also explore the 'strategic mindset' that characterizes organizations that punch above their weight and look at how the board and staff can best work together to guide the organization's direction.

Session 4: The Well-Managed Hiring Process: from Job Design to Onboarding



Bringing new people into the organization is a critical task leaders face. Assuring a fair and transparent process that yields the optimum candidate is a complex and demanding undertaking requiring effective tools and techniques. In this session, Katie will provide an overview of the hiring process with an emphasis on mitigating bias and conducting a thoughtful hiring and onboarding process.

Session 5: Supervising with Confidence: Setting Clear Expectations and Establishing Mutual Accountability

We'd all like to spend less time addressing personnel issues and more time focusing on your work in the world. Learning how to create a foundation of clear expectations and mutual accountability is one of the most powerful and least frequently utilized practices that will set up supervisors and staff up for success. We'll also explore the impact of reducing assumptions and uncertainty, and share how simple, pragmatic tools like workplans and regular standardized check-ins and regular feedback to empower both supervisors and staff. This session will help staff teams operate with greater clarity, trust, and accountability.

For more information or to register please contact
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