

**Petra Learning LLC**  
*(Using Learning as a Spark for Transformation)*  
**Summary of Learning Opportunities**

Learning Topic	Pages	Learning Topic	Pages
<b>Strategic Nonprofit Leadership</b>			
<b><u>Integrated Operations</u></b>	<b>2</b>	<b><u>Business Acumen</u></b>	<b>3</b>
<ol style="list-style-type: none"> <li>1. Talent Management</li> <li>2. Strategic Planning</li> <li>3. Six Practices of High-Impact Nonprofits</li> </ol>		<ol style="list-style-type: none"> <li>1. Board Governance</li> <li>2. Financial Management for Non-Financial Professionals</li> <li>3. Bootstrapping Operations (Low-Cost/High-Power Resources for Startups)</li> </ol>	
<b>Strategic Innovation</b>			
<b><u>Innovation Culture</u></b>	<b>4</b>	<b><u>Innovation Leadership</u></b>	<b>5</b>
<ol style="list-style-type: none"> <li>1. Establishing an Innovative Culture</li> <li>2. Developing Innovation Competencies</li> <li>3. Creating a Learning Environment</li> <li>4. Deploying Creative People Strategies</li> </ol>		<ol style="list-style-type: none"> <li>1. Leading Transformational Change</li> <li>2. Problem Solving and Critical Thinking</li> <li>3. Intrapreneurship</li> </ol>	
<b>Talent Management and Communication</b>			
<b><u>Leadership Skills</u></b>	<b>6</b>	<b><u>Communication Skills</u></b>	<b>7</b>
<ol style="list-style-type: none"> <li>1. Leading High-Performing Teams</li> <li>2. Using Time Management and Delegation Effectively</li> <li>3. Leveraging Conflict to Improve Results and Relationships</li> <li>4. Managing Performance to Engage and Retain</li> </ol>		<ol style="list-style-type: none"> <li>1. Writing and Presenting for Results</li> <li>2. Communicating with Intelligence</li> <li>3. Building Consensus For Change</li> <li>4. The Art of Storytelling with Numbers</li> </ol>	

**Personal and Team Coaching and Consulting**  
**(call for details)**

**Petra Learning LLC**  
*(Using Learning as a Spark for Transformation)*  
**Summary of Learning Opportunities**

## **Strategic Nonprofit Leadership**

### **Integrated Operations**

1. Talent Management

Challenge your approach key talent management activities and understand the major hot spots. Identify opportunities to extract value from human resource compliance processes through integration into talent management, governance and operational management. Learn how to benefit from the investments made in human resource monitoring activities.

2. Strategic Planning

Challenge your approach to the strategic planning processes and whether you are realizing the synergies between strategic planning, risk management, and compliance. Examine potential integration points and practical approaches for incorporating risk management.

3. Six Practices of High Impact Nonprofits

Grow in your ability to drive deep community impact as a force for good. Based on lessons learned from study of twelve nonprofits who have scaled globally and internationally, this course looks at how to use advocacy, marketplace partnerships, cause ambassadors, nonprofit networks, adaptation, and shared leadership to accelerate achievement of community impact goals.

**Petra Learning LLC**  
(Using Learning as a Spark for Transformation)  
Summary of Learning Opportunities

**Business Acumen**

1. Board Governance

What's the proper role of the Board? What types of questions should you ask as a Board member? What type of information should you receive? As a leader of a non-profit, are you utilizing your Board to its full potential? Learn how to leverage one of your non-profits most precious resources so that you can accelerate the achievement of your mission.

2. Financial Management for Non-Financial Professionals

Learn how to create realistic budgets and cash flow projection that supports strategic decision-making and funding. Establish a price point that covers break-even costs in a worst-case scenario and earns the desired targeted return in their most likely scenario. Learn strategies for adjusting pricing to be responsive to the changes in the external business environment while maintaining sufficient returns. Develop a sufficient understanding of techniques to monitor and control cash flows to allow for freeing funds to invest into the growth of the company. Objectively assess their performance using the standards that potential third-party investors and funders would use so that they are prepared to "sell" their value proposition. Explore How to use profitability information (sales and costs) to identify segments to invest, divest, or maintain.

3. Bootstrapping Operations  
(Low-Cost/High-Power Resources for Startups)

At what point does bootstrapping operations, wearing multiple hats, and running lean and mean begin to limit your growth? That's the question that every entrepreneur and small business owner encounters at some point. This session explores that question in detail as we examine 7 key functions within a business: sales, marketing, financial accounting, financial management, customer service, compliance and law, and people management. Explore strategies for resourcing these functions at a lower cost so that there is more time for strategic thinking, planning, innovation, and relationship building.

## **Innovation and Transformation**

### **Innovation Culture**

#### 1. Establishing an Innovative Culture

If you want to accelerate achievement of your mission, you need to move beyond the modest cost improvements and efficiency gains realized through incremental improvements in programs, services, and processes. Learn how to move your organization forward toward evolutionary or transformative innovation. Explore the culture and systems necessary for Level 2 and Level 3 innovation to flourish and examine your environment against these parameters. Complete a mini-innovation evaluation tool and discuss practical next steps.

#### 2. Developing Innovation Competencies

Innovation skills can be cultivated. Self-assess your innovation competencies and identify opportunities for further development. Develop your ability and your team's ability to engage in the non-linear, cooperative thinking that is the underpinning of innovative ideas. Examine brainstorming pitfalls that can torpedo attempts to generate fresh thoughts. Learn new tools for encouraging divergent thinking and, at the appropriate time, consensus building.

#### 3. Creating a Learning Environment

Innovators are learners. Transformative leaders create opportunities for learning to occur. How do you embed continual learning into the DNA of the company? What do you need to know about informal learning? Informal learning is not a new phenomenon; however, advances in technology provide new opportunities for engaging in social learning. What strategies can you use to harness the collective knowledge of your workforce and their networks? How can you embed learning networks into your daily processes? Learn how you can use learning as the transformative spark within your company.

#### 4. Deploying Creative People Strategies

Human resource processes must support the creative environment that you desire. What are types of talent management changes companies need to make encourage creativity within the workplace? How does employee satisfaction impact innovation and what can you do to engage people in different ways without breaking the bank? How can you use crowdsourcing and open innovation as a part of your people strategy? This session looks at the transformative people strategies necessary to support an innovative culture.

**Petra Learning LLC**  
(Using Learning as a Spark for Transformation)  
Summary of Learning Opportunities

**Innovation Leadership**

1. Leading Transformation Change

Understand the risks associated with change projects and the key factors that contribute to failure. Gain an understanding of change management concepts, methodology, and tools. Understand the benefits of change management and when to use change management processes. Understand the requirements for sustainable change and explore your role in helping their organization implement change in a sustainable fashion. Use simulation to explore the seven dynamics of change that leaders must confront and deal with effectively.

Explore 10 key competencies required to effectively lead change. Learners use small group discussions, case studies, role plays, and simulations to practice new skills. The lab use a five-step skill development process (Ready-Set-Go) based upon the principle that adults learn best by doing. Apply new skills and concepts as you learn them and share your insights through relevant hands-on activities. Don't sit through another boring lecture session. Instead get engaged, get connected, and get results

2. Problem Solving and Critical Thinking

Far too many resources are wasted solving the wrong problem. Good problem-solving begins with a sound problem statement. Learn the steps to problem identification, problem statement definition, problem decomposition, and problem analysis. Examine the most common pitfalls experiences with problem statements. Explore the tools available to assist with analyzing problems and validating solutions. Discuss the role of critical thinking in problem-solving and assess your critical thinking skills using six-defining attributes. Understand techniques for decomposing processes with the intent of identifying opportunities for process improvement, providing business insights, and identifying weaknesses that leave you exposed to the potential for fraud.

3. Intrapreneurship

Taking initiative, without being asked to do so, has its risks, challenges, and rewards. The idea of intrapreneurship is often embraced by organizations but the practicalities of daily responsibilities, performance measurements, and resource allocation are real obstacles to implementation. What techniques can be used to successfully act in an intrapreneurial fashion within your non-profit organization?

**Petra Learning LLC**  
*(Using Learning as a Spark for Transformation)*  
**Summary of Learning Opportunities**

## **Talent Management and Communication**

### **Leadership Skills**

1. Leading High-Performing Teams

Identify attributes of high-performing teams and supporting team-processes. Examine strategies for handling team issues and conflicts. Self-assess your team management style, identify opportunities for improvement, set goals for your team, and establish action plans for achievement. Identify essential steps for coaching team members for performance. Explore the role of competency identification and assessment in developing personal development plans.

2. Using Time Management and Delegation Effectively

Explore key principles of time management, how they impact organizational productivity and scheduling, and how to move individuals and teams toward more effective time management. Identify tools and techniques that can help small and medium size functions maximize their efficiency and productivity. Examine techniques for managing meetings effectively. Understand the benefits to effective delegation and the requirements for delegating effectively. Practice delegating under different scenarios with different personality types and performance levels. Assess your delegation style and identify opportunities for improvement. Establish developmental goals and a responsive action plan.

3. Leveraging Conflict to Improve Results and Relationships

Identify the key elements of your personal style that impact how you manage conflict situations. Identify the key principles of conflict management. Understand how conflict management styles impact team performance and communications. Learn how to identify cues that would indicate that an adaptation of your conflict management style is warranted.

4. Managing Performance to Engage and Retain

Understand the benefits and challenges of developing competency maps for staff and experienced professionals. Understand the linkage between competency maps, development plans, and goal setting. Identify the attributes that contribute to effective goal setting for professionals. Explore effective and ineffective feedback through case studies.

**Petra Learning LLC**  
(Using Learning as a Spark for Transformation)  
Summary of Learning Opportunities

**Communication Skills**

1. Writing and Presenting for Results

Examine the types of communication, communication criteria, and communication styles. Understand the attributes of well-designed communications and the steps required to create effective messages across a variety of mediums. Assess the impact of the different communication needs of key stakeholders on medium-selection. Assess your written communication against the criteria and develop an improvement plan. Transform messages into visual media. Explore how to incorporate different interactive elements into your presentation approach to engage the audience and appeal to different learning and thinking styles. Review pros and cons of different presentation tools and how to identify the appropriate tool to enhance your presentation based on audience dynamics. Emphasis is on concepts and techniques.

2. Communicating With Intelligence

Appreciate the value of emotional intelligence and cultural literacy. Identify the listening and reflecting skills that will enable you to engage constituents with differing agendas and deliver difficult messages with confidence and impact. Learn how to lead with EI. Use three basic keys to building strong relationships to evaluate current relationships and establish action plans. Learn how to curate content and use social media to establish credibility, trust, and value.

3. Building Consensus For Change

Selling change has two things going against it: 1) people don't like change and 2) people don't like to sell. Yet, selling change is fundamental to what we must do every day to gain acceptance of new ideas, new operating models, new processes, etc. So how do you leverage your personality, talents, skills, and abilities to develop a sales style that fits you while delivering results? Learn how to use powerful communication and facilitation skills to drive and influence conversation and build consensus.

4. The Art of Storytelling with Numbers

Don't give them too little. Don't give them too much. How do you present just the right amount of data for the audience? There is an art to storytelling with numbers that is not dependent on the visualization or presentation tools at your disposal. While the devil may be in the details, your job is to bring to light these hidden insights in a straight-forward, easy-to-grasp manner. Case studies derived from the systematic study of human behavior and decision-making will be used to illustrate the benefits and drawbacks of data.