



FINANCE › MANAGEMENT › LEADERSHIP

CAPACITY DEVELOPMENT WORKSHOPS

*The Best Source of
Information and Training
in Aboriginal Finance,
Management and
Leadership*



AFOA CANADA

Building a Community of Professionals

ABORIGINAL FINANCE & MANAGEMENT

Host an AFOA Canada community workshop where our facilitators come to you!

Travel can be costly when you are trying to access training for management, staff and elected leaders. We are pleased to offer workshops that are delivered right at your door, on key management and financial issues in your community or a location of your choice. Participants are also provided with publications, tools and guides. Some of the following workshops may be of interest to you.

PERFORMANCE MEASUREMENT AND REPORTING IN FIRST NATIONS

The key focus of this workshop is on reporting on performance to community members. The workshop covers the following topics: core principles of performance reporting in First Nation environments; links principles to financial reporting; the Aboriginal Performance Wheel; the appropriate level and frequency of reporting; important aspects of performance; the kinds of information to be reported; and preparing reports on goals. **[2 DAYS]**

DEVELOPING AN EFFECTIVE MANAGEMENT ACTION PLAN FOR FIRST NATIONS

In April 2011, Aboriginal Affairs and Northern Development Canada (AANDC) revised its Intervention Policy to create a new Default Prevention and Management Policy and developed new tools to support this Policy. The tools include the Management Action Plan (MAP), which replaces the Remedial Management Plan (RMP). A MAP is a comprehensive planning initiative which helps First Nation communities and Aboriginal organizations address underlying causes of defaults in funding agreements. This workshop covers the following topics: the new Policy for Default Prevention and Management, the Directive on Default Management, the MAP Process; the evolution from RMP to MAP; and a General Planning Guide based on a strategic planning process. Many workshop participants attend this workshop because they may be required to develop a Management Action Plan, because they are in a form of intervention, or to broaden their management skills and learn how to avoid intervention. **[2 DAYS]**

“The Effective Planning, Creation and Implementation of Your Trust pre-conference workshop was very motivational and inspiring. It provided more tools to assist with my job.”

TERESA C. MIGWANS, CAFM
TRUST ADMINISTRATOR, ATIKAMEKSHENG TRUST, ON

EFFECTIVE PLANNING, CREATION AND IMPLEMENTATION OF YOUR TRUST

More and more Aboriginal communities are creating Trusts as a result of the increasing number of specific claim settlements, impact and economic benefit agreements and other resource sharing opportunities. The resulting increase in wealth accumulation is placing tremendous responsibility upon leadership, management, and staff to create effective Trust structures. This workshop is designed to raise awareness and understanding among community officials about the following topics: how to plan a Trust; increased community readiness; understanding the complexities in creating a Trust; ways to create the most appropriate Trust structure for your needs; key areas in implementing a Trust; and suitable investment strategies that meet the needs of the Trust today and for future generations. **[2 DAYS]**

AN INTRODUCTION TO COMPREHENSIVE COMMUNITY PLANNING IN FIRST NATIONS

Many communities throughout the country are undertaking Comprehensive Community Planning (CCP) in an effort to improve their economic base while asserting their independence and ownership of community resources. Using best practices and case studies this workshop focuses on: history and evolution of CCP; exploring Indigenous principles; and current models and insights from First Nations who have completed a CCP. **[2 DAYS]**

STRATEGIC PLANNING IN FIRST NATIONS

Strategic Planning in First Nation communities is an essential component of community development. A strategic plan is a road map to lead a community from where it is now to where it would like to be in five or ten years. Learn how to engage the right people within the community and understand the resources required to make your strategic plan a reality. Learn what the key components of a successful strategic plan are and how to measure progress on your community's strategic plan. **[2 DAYS]**



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VALUES AND ETHICS IN THE ABORIGINAL WORKPLACE

This workshop has been developed to provide participants with a broad understanding of creating and maintaining values and ethics within the Aboriginal workplace. The workshop covers the following areas: business ethics; how ethics relate to Aboriginal traditions; fundamentals of human resource management; how to develop a code of ethics for your organization; how the issue of ethics impacts governance and accountability; and all aspects of community and economic development activities. **[2 DAYS]**

AN INTRODUCTION TO COMMUNITY ECONOMIC DEVELOPMENT

Increasingly, economic development is being recognized as a way for Aboriginal governments and communities to increase their wealth, citizen employment, community pride, and to build the influence and financial resources needed for other important goals. Economic development can be approached in many different ways and it can all seem overwhelming. This workshop provides an understanding of economic development; encourages discussion of best practices and lessons learned; and provides the basic tools needed to begin your own successful strategic economic development planning process. **[2 DAYS]**

DEVELOPING BUSINESS PLANS AND FUNDING PROPOSALS

There is an increasing need for First Nations to develop multiple sources of revenue and to move away from their dependence upon federal financial transfers. With this in mind, greater emphasis is being placed on the development of community owned business and development corporations. A Business Plan is a vital tool that can help assess whether the development of a new business or the purchase of an existing business is prudent. This workshop will help you better understand the business planning process and the key elements of an effective business plan. **[1 DAY]**

NEW! RETIREMENT PLANNING

Retirement Planning for Aboriginal peoples is a new financial literacy workshop developed to fill a knowledge and skill gap that currently exists with 63.4% Aboriginal peoples knowing little to nothing about saving for retirement (*Aboriginal Financial Literacy Needs Assessment and Framework*, July 2015, AFOA Canada). Topics covered in the workshop include: Retirement Overview; Developing a Sound Financial Plan; Sources of Income; Tax Planning; Government Benefits; Insurance; Estate Planning; and Other Considerations and Options. **[2 DAYS]**

NEW! BANKING SERIES

See separate *Banking Series Workshops* flyer for more information.

BANKING 101 – THE BANKING RELATIONSHIP
(English only) **[1 DAY]**

BANKING 201 – NEGOTIATING CREDIT FACILITIES WITH A FINANCIAL INSTITUTION **[1 DAY]**

BANKING 301 – FINANCING A MAJOR ECONOMIC DEVELOPMENT PROJECT OR INFRASTRUCTURE PROJECT **[1 DAY]**

BANKING 401 – WEALTH MANAGEMENT **[1 DAY]**

HUMAN RESOURCES MANAGEMENT ESSENTIALS

See separate *Human Resources Management Workshops* flyer for more information.

MODULE 1 – PROFESSIONAL PRACTICE **[1 DAY]**

MODULE 2 – PLANNING AND STAFFING **[1 DAY]**

MODULE 3 – PERFORMANCE MANAGEMENT AND EMPLOYEE TRAINING AND DEVELOPMENT
[1 DAY]

MODULE 4 – EMPLOYEE COMPENSATION AND BENEFITS **[1 DAY]**



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ELECTED ABORIGINAL LEADERS

“The Politics of Ethical Decision Making for Elected Aboriginal Leaders workshop is an absolute must, especially for elected council members who have never served on council previously.”

DIANE MCRAE, CAFM, MANAGER, ADMINISTRATION & FINANCE, GITKSAN GOVERNMENT COMMISSION, BC

THE POLITICS OF ETHICAL DECISION MAKING FOR ELECTED ABORIGINAL LEADERS

This workshop was designed specifically for elected Aboriginal political leaders and focuses on the vital role that ethics play in their daily lives and the importance of ethical leadership in an Aboriginal setting. The workshop covers the following topics: rights, responsibilities and ethics; how they interact; how each influences the way Aboriginal elected leaders carry out their day-to-day jobs; common situations faced in elected positions where ethical issues are at stake; critical questions leaders must ask when wanting to make an ethical decision; and the essentials for creating an ethical work environment. [2 DAYS]

DEMYSTIFYING FINANCE FOR ELECTED ABORIGINAL LEADERS I

Understanding financial information is one of the key challenges facing elected officials in Aboriginal communities. Elected officials are an important element of the financial governance of any Nation because they provide necessary financial oversight. They must understand and interpret financial reports and information to make key decisions with significant impact on their communities. The workshop focuses on 1) building financial literacy and 2) developing financial capacity. [1 DAY]

DEMYSTIFYING FINANCE FOR ELECTED ABORIGINAL LEADERS II

Working to enhance and strengthen the knowledge of elected Aboriginal leaders in performing their community financial responsibilities, this workshop builds on Demystifying Finance for Elected Aboriginal Leaders I. This workshop takes an analytical approach to understanding how to analyze financial reports through the use of financial ratios. The most frequently used financial ratios for Aboriginal organizations will be discussed and how they apply to community decision-making. These ratios include Industry ratios, INAC ratios and the First Nation Financial Management Board financial ratios. There will also be a discussion on financial trends, debt and revenue sources. [1 DAY]

NEW! FIRST NATIONS COMMUNITY GOVERNANCE I

This workshop on First Nations Community Governance is directed toward elected Aboriginal leaders and Senior Administration staff working in First Nation communities. It has been designed to provide a general overview of Aboriginal governance concepts, as well as many practical examples and best practices to assist elected Aboriginal leaders and administration staff in better understanding the roles and responsibilities of the governing body, administration and community members. Topics covered include: role of Aboriginal governing bodies; local Aboriginal governance structures and issues; principles of good governance; a First Nations perspective; the power of Chief and Council; tools for council meeting management; and a refresher on policy. [1 DAY]

NEW! FIRST NATIONS GOVERNANCE II

Effective governance is essential to the success of First Nations communities. In this workshop tools have been developed that elected leaders can use in performing their leadership functions. Topics covered include: orientation and transition of newly elected leaders; elected leaders mandate and administration priorities; knowing your community history and context; organizational and community issues; moving towards prosperity; governing beyond the *Indian Act*; and others. [1 DAY]

NEW! EFFECTIVE LEADERSHIP

While effective leadership is the most critical factor in the success of an organization, community or business, it is a concept that covers a diverse array of meanings. Effective Leadership explores the concepts of leadership, management, and governance and the relationship and interdependence that exists among them. Participants will build valuable new skills: learn about the core leadership skills that are the foundation of effective leadership including strategy, action and results; and learn about adaptive leadership skills which represent the qualities that great leaders have in common including emotional intelligence, organizational justice, character and development. You will learn about yourself and how to better lead others in providing service and support to organizations, boards, and communities. [1 DAY]