



# AFOA BC Community-based Workshops

We deliver AFOA BC workshops at various times throughout the year, or we can tailor the training to your community needs, such as workshops for band owned businesses, economic development corporations or non-profit organizations.

## First Nations Financial Fitness

First Nations citizens face complex financial issues and need knowledge, skills and confidence to make informed decisions. AFOA BC has developed a workshop and handbook—Financial Fitness: Your Guide for Getting Healthy, Wealthy and Wise—to empower First Nations to become financially literate. The two-day workshop reviews key areas of financial knowledge and management. Participants will learn about:

- **Financial literacy** – Learn how being financially fit supports informed financial choices to meet basic needs and plan for the future
- **Managing money** – Find out about potential income sources, expenses, and how to save money
- **Budgets and banking** – Discover the difference between needs and wants, how to create a budget, how to organize and track spending, and how to use different bank accounts
- **Credit** – Learn what's good and bad about credit cards, how to get out of credit card debt, and how prepaid credit cards work
- **Tax returns** – Discover how to file a tax return, tax credits and benefits

## Essentials of First Nations Financial Management

Sound financial management is crucial to the success of First Nations economic development. AFOA BC's workshop will give First Nations leaders and managers a solid knowledge of financial planning and control. Participants learn about key areas of responsibility:

- **Management principles** – Review the underlying principles of financial planning and control in First Nations operations
- **Accounting cycles** – Learn about accounting cycles and activities for First Nations
- **Finance roles and responsibilities** – Understand the roles of First Nations leaders and the finance department in organizing, planning and controlling
- **Fund and business accounting** – Learn the differences in fund and business accounting
- **Financial management reports** – Understand financial reporting requirements and how to read statements to assess financial standing

## First Nations Strategic Planning & Community Development

Strategic planning underpins successful First Nations community development, self-sufficiency and prosperity. AFOA BC's workshop uses a case study to help First Nations develop and implement a strategic plan focused on health, economic development and/or housing. Participants learn about:

- **Creating a strategic plan** – Learn how to develop a strategic vision, directions, goals and action plan, and engage community stakeholders in the process
- **Evaluating progress** – Discover how to identify key performance indicators, track and measure progress, and report back on developments to stakeholders
- **Modifying the strategic plan** – Find out how to update the strategic plan, based on findings from the evaluation process
- **Identifying resources** – Determine the resources required to make the strategic plan a reality, including funding for capacity building, the planning process and implementation

## First Nations Financial Management & Governance Systems

Good governance is the foundation for effective financial stewardship and economic development. AFOA BC's workshop examines the relationship between good governance and financial management. Participants learn about:

- **Effective systems** – Discover tools, successful models and best practices for good governance and financial management for self-governing First Nations
- **Present and past** – Explore the history and current issues affecting good governance among First Nations
- **Roles and responsibilities** – Learn about the duty of First Nations leaders and employees to achieve good governance and effective financial management
- **Essential elements** – Examine and understand the importance of developing a constitution, creating bylaws and related policies
- **Accountability** – Learn how to increase accountability, transparency and communications in fiscal management



## First Nations Audit & Financial Reporting

Robust financial reporting and fiscal management support wealth creation in First Nations communities. AFOA BC's workshop will familiarize First Nations leaders and staff with the auditing process and financial reporting requirements. Participants learn about:

- **Setting up systems** – Review generally accepted accounting principles and how to set up accounting systems to make reporting easier
- **Audit process** – Learn 10 steps to improve the audit process and lower the audit cost
- **Financial reporting responsibilities** – Find out about interim, internal and external reporting requirements, and an overview of Indigenous and Northern Affairs Canada's (INAC) year-end reporting requirements

## First Nations Band Management & Best Practices

Many band managers and First Nations staff strive to meet community needs and respond to administrative and financial challenges with limited resources. AFOA BC's workshop will help First Nations personnel manage effectively within existing resources. Participants learn about:

- **Time management** – Find out how to increase efficiency, promote team building, avoid pitfalls and prevent burnout
- **Strategic planning** – Discover how to identify strategic directions, develop a plan, monitor progress and evaluate success
- **Managing human resources** – Review employment policies/procedures, legal issues, the Band Manager's duties, and best practices in hiring and firing
- **Financial planning and accountability** – Learn about successful wealth management, capital project planning, trust administration, and annual/multi-year cycles
- **Economic development (ED)** – Discover how to create a community ED plan, identify ED opportunities, achieve tax advantages for First Nations, and finance ED projects

## First Nations Financial Administrative Bylaw (FAB)

Many First Nations are realizing the importance of having a financial administrative bylaw that outlines how they will manage their finances. A FAB is a set of comprehensive rules that guides a First Nation in how money is spent and accounted for. AFOA BC has developed a two part technical workshop to customize a FAB and Conflict of Interest Policy for your community.

- A clause by clause review and revision of a draft FAB
- Steps your First Nation will need to take to meet the financial administration standards set by the new FAB
- Orientation for staff and band council on new financial rules and procedures
- Process for council approval for a new FAB

## First Nations Wealth Management

Wealth Management ensures First Nations establish mechanisms that will build and protect wealth for future generations. The two-day workshop reviews how wealth is created, how to protect wealth, and mechanisms to grow wealth for the future. Participants will learn about:

- **Creating Wealth** – Learn about opportunities arising from Impact Benefit Agreements, Treaty and Land Claim Settlements, Economic Development Corporations, and business partnerships with the private sector, as well as the financial laws/policies needed to support these initiatives
- **Best Practises** – Find out how to protect, invest and grow accumulation capital, balance community needs of today with those of future generations, develop a community plan, establish an effective investment strategy, select a management firm, and monitor performance
- **Create Strategies** – Build the foundations for change management, communication, financial planning, consistent governance, corporate and tax structures, capacity building, and performance indicators to achieve long term objectives at an appropriate level of risk, based on local circumstances

## First Nations Economic Development Corporations

This workshop outlines the process of starting a First Nations Economic Development Corporation. It outlines key steps, players, roles and responsibilities, policy, HR and taxation structures. It further highlights best practices in law and governance. The workshop also outlines how to prioritize projects, examines the project management process and monitoring financial assets. Here is what you will learn:

- Why an Economic Development Corporation?
- Vision and Mandate
- Legal overview
- Functions – HR, operations, finance, marketing and governance

## First Nations Human Resource Planning

HR planning involves the development of a clear and practical strategy to ensure that First Nations communities and organizations have the right people at the right time in the right jobs all working together to achieve the vision, mission and goals. HR done right can achieve this outcome. Participants will be able to demonstrate an understanding of the following principles:

- A basic understanding of the 19 Key Responsibility Areas (KRA's) generally supported by HR
- A detailed examination of the first three KRAs:
  - a. Vision, Mission, Values, Symbolism — Your Why/Intention = Culture
  - b. Culture as it pertains to Organizational and Community
  - c. HR Strategy
- An understanding of HR Strategy and a solid first draft HR Strategic Plan

“AFOA BC workshops are designed to build professional capacity within First Nations to foster economic development and self-sufficiency.

*Brian Titus, CAFM, Chief Operating Officer,  
Sqéwqel Development Corporation*

