



Finance Learning Group

Interactive knowledge and skill-building program to support any professional working with nonprofit finances - from program budgeting to fundraising records to accounting.

This Learning Group features six hands-on virtual workshops that cover the mechanics of nonprofit accounting and the “blueprint” for financial accountability and sustainability. Participants will develop and/or refine accounting policies, job descriptions, and task matrix. The learning group format features expert facilitation and peer-to-peer learning and exchange.

Sessions & Topics:

Session 1: The Critical Role of Finance and Finance Professionals

- Importance of organizational finance assessment
- Essential elements of a nonprofit accounting system
- Assignment: Organizational Financial Assessment

Session 2: Your Accounting Process, Controls and Policies

- Who are the players? A look at your organization chart and Board list
- The approval process and identifying the strengths and weaknesses
- Assignment: Prepare financial tasks matrix

Session 3: Financial Reporting and Planning

- What reports do you need?
- Analyzing financial health
- Assignment: Complete ratio analysis of two years financial statements

Session 4: Managing Multiple Programs

- Budget Development
- Reporting for various funders
- Tracking your programs, department, grants, projects
- Assignment: Create/update budget narrative/assumptions

Session 5: Governance

- Ethics and Accountability
- Data Management
- Decision making based on financial reports

Session 6: Implementation

- Show & Tell – What has changed at your organization?
- Tech Show & Tell – A quick tour of the finance apps that can help your organization

Who Should Attend

Individuals responsible for the financial management of a nonprofit organization. This program requires access to the organization’s financial reports for, at minimum, the last two years. Learning groups thrive on the open exchange of ideas and the experience of each and every participant.

You will receive the greatest benefit if you: Attend each session. Scheduled time to complete the homework assignments. Schedule time to apply at work what you learn and develop in group.