Advanced Financial Stewardship for Non-Profit Organizations

24 – 28 May 2027
London (UK)



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Introduction

This comprehensive 1-week course is designed for professionals in non-profit organizations who wish to enhance their advanced financial stewardship skills. The course focuses on advanced financial management techniques tailored to the unique needs of non-profits. Participants will learn how to optimize resource allocation, ensure compliance, and maintain financial sustainability. It covers budgeting, financial reporting, and risk management, empowering participants to make informed financial decisions. By the end of the course, attendees will be equipped to manage non-profit finances with greater efficiency, transparency, and accountability.

Course Objectives

By the end of this course, participants will be able to:

- Master Financial Reporting: Learn how to create accurate and transparent financial reports that align with non-profit standards.
- Enhance Budgeting Skills: Develop advanced budgeting techniques tailored to non-profit operations.
- Ensure Financial Compliance: Understand legal and regulatory requirements and how to ensure compliance.
- Optimize Resource Allocation: Learn how to allocate resources efficiently to maximize impact.
- Improve Cash Flow Management: Gain skills to manage cash flow and prevent financial shortfalls.
- Strengthen Fundraising Financial Strategies: Design financial strategies to support sustainable fundraising.
- Assess Financial Risk: Understand risk management techniques to protect non-profit finances.
- Monitor Financial Performance: Learn how to track and assess financial performance against goals.
- Implement Financial Sustainability Practices: Build long-term strategies for ensuring financial sustainability for your organization.



Course Outlines

Day 1: Foundations of Financial Stewardship in Non-Profits

- Understand the principles of financial stewardship in the non-profit sector.
- Explore the importance of transparency and accountability in financial management.
- Learn about non-profit financial structures and reporting requirements.
- Review financial statements specific to non-profit organizations Statement of Activities, Balance Sheet, Cash Flow.
- Discuss the role of financial stewardship in supporting the mission and vision of a non-profit.
- Understand ethical considerations and the impact of financial decisions on stakeholders.

Day 2: Budgeting and Forecasting for Non-Profit Sustainability

- Develop effective budget models tailored to non-profit needs.
- Learn the process of creating a budget based on program and organizational goals.
- Use forecasting tools to predict revenue and expenses for the upcoming year.
- Analyze historical financial data to improve future budgeting decisions.
- Gain insights into allocating restricted versus unrestricted funds.
- Understand how to adjust budgets during the year based on changing financial conditions.

Day 3: Managing Cash Flow and Financial Health

- Learn how to monitor and manage cash flow in a non-profit organization.
- Identify cash flow challenges and strategies to address them.
- Understand the importance of working capital and liquidity in non-profits.
- Develop strategies to ensure consistent and stable cash flow.
- Explore ways to manage receivables, payables, and grants.
- Implement internal controls to protect financial resources and prevent fraud.

Day 4: Financial Compliance and Risk Management

- Understand the legal and regulatory requirements for non-profit financial reporting.
- Learn about IRS compliance and filing requirements for non-profits.
- Explore the key risks facing non-profit organizations and how to mitigate them.
- Develop strategies to comply with donor restrictions and grant reporting.
- Understand the importance of audit processes and financial reviews.
- Discuss the role of the board in financial oversight and compliance.



Day 5: Fundraising and Resource Diversification

- Learn strategies for diversifying revenue streams for long-term sustainability.
- Understand how to align financial management practices with fundraising goals.
- Explore different types of fundraising: grants, individual donations, corporate partnerships, and crowdfunding.
- Review the impact of donor restrictions on financial planning.
- Develop skills for building strong financial relationships with donors and investors.
- Analyze case studies of successful financial stewardship in resource mobilization for non-profits.

Why Attend This Course: Wins & Losses!

- Master Financial Reporting: Gain advanced knowledge of financial reporting specific to non-profits.
- Learn How to Develop Realistic and Impactful Budgets: Develop budgeting skills that meet the unique needs of the non-profit sector.
- Ensure Financial Compliance: Learn how to ensure compliance with legal and regulatory requirements.
- Build Strategies for Long-Term Financial Sustainability: Design financial strategies that support long-term success.
- Manage Cash Flow Effectively: Learn techniques to manage cash flow and prevent shortages.
- Optimize Resource Allocation: Discover how to allocate resources efficiently to maximize impact.
- Track and Measure Financial Performance: Improve your ability to track and assess financial performance.
- Strengthen Fundraising Capabilities: Learn how to raise funds and secure donations for financial growth.
- Enhance Risk Management Skills: Build your ability to assess and mitigate financial risks.
- Position Your Non-Profit for Financial Success: Learn best practices to ensure the financial growth and sustainability of your organization.

Conclusion

This course equips participants with the knowledge and skills necessary to manage non-profit finances efficiently and effectively. Through improved financial reporting, budgeting, cash flow management, compliance, and risk management, participants will be able to implement financial strategies that support long-term sustainability and success for their organization.

By mastering these core financial skills, you will enhance the ability of your non-profit to achieve its mission and make a lasting impact.

