

Fiscal Management Training for Non-Profit Leaders

Through a comprehensive two-day training session, The Finance Project helps nonprofit leaders understand the fundamentals of fiscal management.

Why provide fiscal management training for non-profit leaders?

Leaders of small nonprofits typically have a wealth of program-specific knowledge and a passion for the work of their organization. What they may lack is knowledge of the management systems required to ensure that their organization is fiscally sound.

How can fiscal management training for non-profit leaders help?

Fiscal management training helps nonprofit leaders to:

- Understand the basic elements of their fiscal management systems;
- Set expectations for their board members and finance staff;
- Apply financial management principles and practices, enhancing their ability to communicate with financial professionals in and out of their organization; and
- Lead their organization towards meeting their accountability responsibilities.

Services offered by The Finance Project

The Finance Project staff customizes its two-day training to the specific needs and conditions of client organizations.

1. **Structuring an accounting system** that fits the needs and capacities of their organization.
2. **Preparing and executing budgets** that support the mission and goals of the organization.
3. **Establishing financial controls** to prevent fraud, waste, and abuse.
4. **Determining and allocating overhead** across programs.
5. **Creating effective financial reports** that inform decision-making and support policy planning.
6. **Preparing for an audit** and ensuring that the results are positive.
7. **Complying with Sarbanes-Oxley and the new IRS Form 990** to meet the standards of the law.

Participants are led through interactive exercises and provided with templates and sample policies to help build their financial systems. In addition, each participant receives a copy of [“Beyond the Checkbook: A Financial Management Guide for Leaders of Small Youth-Serving Organizations.”](#)

Examples of Our Work

- **The Family and Community Trust, Missouri.** The Finance Project twice provided two-day trainings to leaders of multi-service agencies funded by the Trust. Using an online pre-assessment tool, each training was tailored to meet the specific needs of participants.
- **Get Smart Schools.** The Get Smart Schools Initiative prepares educators to lead charter schools in Colorado. At their request, The Finance Project customized its fiscal management training to address the concerns of charter school founders.

What do our clients have to say?

- *“This training was very helpful to me as an educator with little to no experience in finance and accounting. I appreciate you making the information accessible without being condescending.”*
- *“I loved the charter school-specific examples used during the presentation. Great overview of all the things to think about.”*

For more information contact The Finance Project at 202-628-4200 or services@financeproject.org.