

How to Improve your Nonprofit Operations in Under Two Months & Commonly Asked Questions

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Who's in the room? Duration in the Sector

- (0 – 6 Months)
- (6 Months – 2 Years)
- (2 – 4 Years)
- (4 Years+)



Goal of this workshop

- Go back to your organizations and spend less time worrying and/or thinking about Nonprofit Operations.
- Ability to spend more time on program work and achieve your mission.

Overview-10 Nonprofit Operations Success Steps

- Today these specific topics will be covered
 - Insurance
 - Human Resources
 - Financial Management
 - Fundraising
 - Board of Directors

Step 1: Review the organization's Insurance policies



- General Liability
 - Special event forms
 - Non-hired auto
- Directors and Officers
- Errors and Omissions



New Nonprofit Nexus Common Question

- What does Directors and Officers Insurance Cover?



Step 2: Create a new hire packet

- Training orientation procedures for new employees.

Step 3: Review employment records

- Organize records to include relevant information:
 - employee attendance,
 - disciplinary warnings,
 - vacation requests,
 - employment hiring forms,
 - benefit enrollment forms.

Step 4: Review the accounting books

- Resolve accounting/bookkeeping errors.
- Incorporate Nonprofit Chart of Accounts and/or clean up the chart of accounts.
- Hire an accountant on a monthly basis to review the financial books and provide Generally Accepted Accounting Practices (GAAP) procedures.



New Nonprofit Nexus Common Question

- How do we create a budget for a new program?

Step 5: Create accounting/bookkeeping procedures and necessary forms

- To keep in compliance with GAAP procedures.
- Create reimbursement/check request

Step 6: Review vendor lease agreements and bill paying practices

- Implement any cost saving methods the organization can take with working with its vendors.
- For example, pay off a lease early to avoid having to pay an excess amount of interest.

Step 7: Review Database and File Saving Methods

- Create database entry procedures.
- Train staff on those procedures.
- Create a file saving procedure.
 - For example (NameOfFileDateVersion.doc).

Step 8: Review Development Tracking

- Create procedures for grant writing and submitting grant proposals as well as cultivating the donor relationship.
- Create fundraising calendar that includes grant deadlines, report dates, and renewal dates.

Step 9: Board Policies and Procedures

- With board's advice and input
 - Create or revise board orientation binder and board job description.
 - Compile board minutes from all previous board meetings and place together in one binder, or one binder per year.
 - The board minutes are supposed to be available for the public at all times.



New Nonprofit Nexus Common Question

- What are board members responsible for?

Step 10: Plan for the rest of the 10 months of the year

- Review marketing practices of the organization including website, newsletter, and promotional materials. Plan steps for improvement of these materials.
- Print out Healthy and Secure Computing booklet from Compmentor and start technology inventory. Assess the computer and networking situation in your office.
- Plan how to templatize the organization's event planning process so that events can be easily replicated, then create procedures for event planning.
- Hire a personnel attorney to start to review and provide recommendations for Personnel Manual to be in compliance with the state's employment law.
- Organize the accounting paper files so they are ready for an accounting review or audit.
- Assess whether or not an office move is necessary. Then take steps to look for a new office space. (See Nonprofit Operations Blog <http://www.aspirationtech.org/blog/nonprofitoperations> Post-Nonprofit Office Space Searching Tips)

New Nonprofit Nexus Common Question

- Where can I get more training and information about the topics covered today.
 - New Nonprofit Nexus
 - <http://www.nonprofitnexus.org/>
 - Nonprofit Operations Blog
 - <http://www.aspirationtech.org/blog/nonprofitoperations>
 - Monthly Nonprofit Operations brown bag lunch discussions
 - Starting Wednesday, September 20th

Q & A

