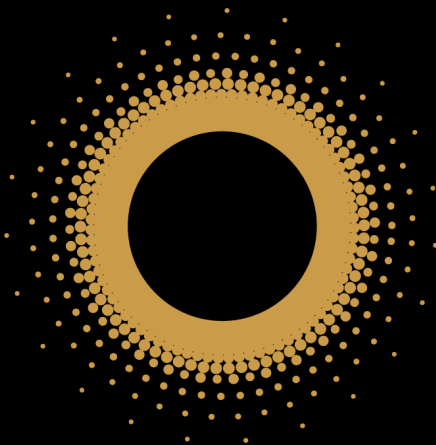


finance masterclass and membership program

FOR NONPROFIT LEADERS

• PROGRAM OVERVIEW



goodcasting
academy

What you get...

**6-week finance masterclass course for nonprofit leaders PLUS
10 months of additional tools, live Q&A sessions and webinars**

THE FINANCE MASTERCLASS INCLUDES:

- › 6-week program that you can consume in small increments throughout each week
- › Self-paced videos which will be dripped every week of the 6 weeks
- › Two 1-on-1 coaching sessions with the course leader, Betty Ferreira, FCPA, FCMA
- › Four online group coaching sessions during the 6-week program
- › Lifetime access to all course materials
- › 25 takeaway tools including templates, checklists and guides
- › No travel or hotel costs! You can take the course anywhere and anytime. All you need is internet
- › Not only do you receive the fundamentals of finance for nonprofit leaders but also 10 additional months of the community finance leaders' membership program with monthly group coaching sessions and additional tools
- › Graduates will receive a certificate that we are working to establish as "THE" finance leadership standard in Canada!
- › Specifically designed for you...the nonprofit leader. Most of my students are CEO/Executive Director, Director of Operations, Finance Director

**MONTHLY
PROGRAM
INCLUDES:**

**monthly
Q&A with
experts**

INCLUDING BETTY FERREIRA

**monthly
tools or
webinars**

FROM FINANCE EXPERTS

Finance Masterclass for Nonprofit Leaders:

Modules and Lessons

finance foundation essentials

MODULE 1

- Learn about the roles of non-finance staff members in finance: Finance Leadership vs Financial Management
- Understand what you need to know about the Audit and the Auditor
- Learn the essentials in the Accounting Standards for Not-for-Profit Organizations
- Learn how to read and understand various Financial Statements
- Understand the reporting obligations to external and internal stakeholders
- Understand the role of the Board, Finance Committee, CEO and non-finance staff in finance
- Learn the best practices in financial statement reporting to the board
- Learn the best practices in budgeting including true and full cost accounting and funder recovery analysis and how to include non-finance managers in budgeting
- Learn the essentials in cash flow management including cash flow forecasting and scenario planning

financial and business model analysis

MODULE 2

- Learn how to write a narrative financial report that clearly communicates the strengths and weaknesses of the organization's financial health and position and that summarizes the financial performance as stated in financial reports, audited financial statements and dashboards
- Understand the nonprofit business model by type of nonprofit organization: government funded organization, member-based association, fee-for-service or social enterprise organizations
- Learn how to analyze the nonprofit business model and develop strategies to strengthen the resilience of the model
- Learn about dashboards including the balanced scorecard
- Learn about various financial ratios and key performance indicators that nonprofit and charitable organizations use
- Learn the pros and cons of using financial ratios and key performance indicators
- Learn how to interpret financial ratios

integrating finance with strategy

MODULE 3

- Learn how to leverage hindsight, insight and foresight in budgeting and financial stewardship
- Learn how to analyze the resilience of the organization's programs and services including cost benefit analysis, break-even analysis and dual-bottom-line analysis
- Learn how to develop a strategy for the organization's reserves (net assets or fund balances)
- Learn how to write a board policy on the organization's operating reserves
- Understand how to integrate financial strategy in the annual budgeting and strategic planning process
- Learn about the 10 discussions all nonprofit board members should have to strengthen their budgeting, financial strategies and financial stewardship of the organization
- Learn about Fiscal Foresight and the requirements for this pending standard

Finance Community Membership

10-MONTH MEMBERSHIP PROGRAM

Following the 6-week Finance Masterclass you will join the Finance Community and enjoy 10 additional months of webinars, live Q&A Ask the Expert Sessions and Tools

Topics for 2020 - 2021 include:

THREE IMPORTANT ELEMENTS OF A RISK MANAGEMENT FRAMEWORK

LOOKING FOR A NEW AUDITOR?
RFP FOR AUDITING SERVICES TEMPLATE AND INTERVIEW QUESTIONS

TOP 10 ANNUAL BUDGETING DO'S AND DON'TS

TIME TO UPDATE JOB DESCRIPTIONS?
FINANCE POSITIONS JOB DESCRIPTION BANK

TOP 25 INTERNAL CONTROLS EVERY NFP SHOULD HAVE IN PLACE

ASK ME/AN EXPERT ANYTHING LIVE Q&A SESSIONS

UNDER THE HOOD:
COMPARE ACCOUNTS PAYABLE TOOLS TELPAY AND PLOOTO

IMPACT INVESTING - ASK AN EXPERT

and much more

Meet The Instructors

Betty Ferreira FCPA, FCMA



A little about me.. I'm a former nonprofit Executive Director now consultant and designated accountant.

I've been where you are now. I used to sit in fear during Board meetings that the Treasurer would ask me a question I didn't have the answer to.

Now I teach nonprofit finance to Treasurers and Nonprofit Organizations of every size across Canada.

Financial leadership is based on logic and strategy, not calculus or physics. If I could "get" finance, you can too.

I'm also:

- the creator and sole instructor of the CPA Ontario nonprofit finance leadership course, which will not be offered in 2020
- the creator and producer of the annual CPA Ontario Not-for-Profit Finance Conference
- a former member of the Accounting Standards Board of Canada's Not-for Profit Advisory Committee
- a regular speaker at the Ontario Nonprofit Network's "Nonprofit Driven" conference, and have conducted several webinars for them
- a sought-after trainer by other intermediaries such as Sustainability Network and United Way agencies

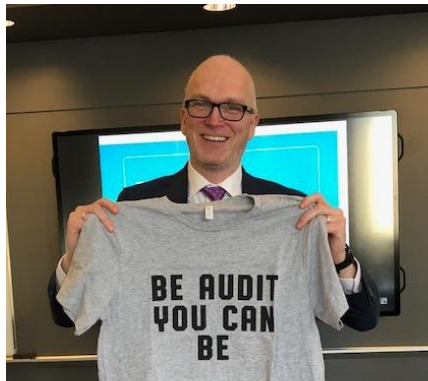
My passion for learning has led me to also obtain a master's certificate black belt in Lean Six Sigma and I have been a member of the Chartered Professional Accountants of Ontario since 2013. I was nominated and received the designation of Fellow of CPA Ontario in 2018.

I am looking forward to being part of your learning journey!

Where you have seen me speak and train...



Get to know the instructors



Stephen McCourt CPA, CA

An audit partner with RSM Canada and the Canadian national not-for-profit industry leader with experience in both public practice and industry, Stephen's primary focus is on addressing the needs of clients with public accountability, including public companies and not-for-profit organizations. Stephen is also the national leader of the not-for-profit industry group. He draws on his experience in industry to bring practical insights to his clients through the services he provides and his training seminars. Stephen graduated Brock University with undergraduate and graduate degrees. He is a CPA, CA, having earned his designation in 1999. He became a partner of RSM Canada's predecessor firm in 2008.



Ninette Bishay CPA, CA

Ninette is a partner of the Charities & Not-for-Profit Team of Hogg, Shain & Scheck CPAs, and has been providing assurance, tax and advisory services exclusively to this sector for most of the past 18 years. Ninette advises organizations on best practices with respect to financial reporting, policies and procedures, and CRA compliance matters. Ninette serves on two CPA Canada advisory committees and as National Treasurer of the Canadian Association of Gift Planners.



Guest Instructors and Speakers

You will also see several other instructors and speakers in both the 6-week portion of the Finance Masterclass for Nonprofit Leaders program as well as in the 10-month membership portion.

Guest speakers will be experts in their fields including leadership, human resources, legal, nonprofit resilience, strategy, and digital transformation. Watch the www.goodcasting.academy site to see the list of speakers and guest instructors grow.

Who is the masterclass for?

The Finance Masterclass for Nonprofit Leaders is PERFECT for...

- **Small to large nonprofit and charitable organizations:** I'll make sure you have the foundation, strategies and tools to strengthen the financial leadership of your organization
- **Nonprofit and Charity CEOs, Executive Directors, Directors of Operations, and Finance Managers:** You don't need to have any finance training at all. This is not a course in accounting (phew!) – it's a course in financial leadership and as such it is oriented to non-finance and finance leadership positions
- **You!:** This masterclass membership program is exclusive only to nonprofit leaders that are using the training to strengthen the financial strategies, processes and practices of the nonprofit organization they work for
- **Believers:** My learners believe that they can strengthen their finance skills and are looking forward to getting the training and tools and templates to help them accelerate their learning and become confident and knowledgeable
- **Action-Takers:** My learners commit to their learning goals and stay accountable, even when it means stretching their comfort zone. They make time to take the weekly training courses and aren't afraid of showing up to a group coaching session and asking a stupid question because they know that there is no such thing as a stupid question...
- **Those that open to personal growth:** It's true that taking a course in finance will feel like personal growth, because it is. My students want the practical strategies and knowledge to help create resilient organizational strategies and the opportunity to learn
- **Those that are ready:** My learners are mostly non-finance staff that never received any finance training, but now they are in management and leadership positions and realize that they are not confident enough with their knowledge and are finally ready to take the plunge
- **Those who want to be happy!:** My learners are happy...no, they are THRILLED that someone like them developed a finance leadership specifically for them and can't wait to get started

Hear what people have to say

France Gauthier, Our Children, Our Future

"Betty's training was a dream come true. When I first heard her speak, I realized I would never miss another opportunity to hear her. It was worth every penny. It wasn't an expense, it was an investment. Hearing her speak completely changed me and it gave me the assurance that my work is important. When she speaks, no one is bored. She just has a way..."

Lorne Wainright, Pillar Nonprofit Network

"What a refreshing way to learn about finances. Betty's ability to express sometimes complex concepts in a way that is digestible for those challenged by financial literacy is impressive. Board members, Executive Directors and those who work in nonprofits in any way should make their way to Betty -either to hear her speak or engage in a deeper way and watch how fiscal responsibility is at the heart beat of any successful organization."

Sushma Subedi, CPA, CGA Artscape Inc.

"I heard Betty speak at a conference and I have taken a training course where she presented...and all I can say is that she had my attention from the very beginning and kept it to the end Betty's speaks are never boring! Even though we covered complex information she made it very easy to understand and remember. I was really impressed with her calm approach and her breadth of experience."

Kimberly Gignac, Ontario Community Support Association

"Betty's training has been my best professional development experience to date. Her approach is both straight forward and inspiring. I walked away with solid information that I still use today. Her training gave me the skills and confidence I needed to support my team and make significant improvements to our work.."

Blair Dimock, Ontario Trillium Foundation

"All it takes is one time hearing Betty speak and I don't know anyone who is not converted. There are so many positive benefits to her presentations. From her delivery and her ability to engage, Betty is able to bring otherwise dry, mundane content to life with actionable tools and insights."

Goodcasting

by ReStructure Consulting



What are your finance learning goals?

What are your goals for learning finance?

What are your finance learning goals?

- Do you want to strengthen your ability to read, understand financial statements?
- Do you want to strengthen budgeting and costing of programs, departments or the organization as a whole?
- Do you want to raise the level of discussion regarding finance with your board?
- Do you want to understand how to analyze and transform your organization's business model?