

# Linking Mission to Money<sup>TM</sup>

Bringing Best Practices into the Board Room  
and Making Finances Understandable

## Focused Discussions

*A series of concise one to two hour workshops that are adaptable to fit easily within regular board or management meetings, conference sessions, or brownbag discussions.*

*Information you need in order to know how this program can help you*

### Goal of workshops

To demonstrate practical applications of critical governance and management tools in a format that easily fits within a busy workday and that provides a readily implemented set of follow-up actions.

**Choose any nine topics** (check [www.linkingmissiontomoney.org](http://www.linkingmissiontomoney.org) for new topics offered)

1. The three roles of a board member .... and three tools to help
2. Uses and abuses in nonprofit finance
3. A layperson's guide to reviewing financial statements (beginner and/or advanced versions)
4. Balancing growth with sustaining your mission
5. Linking your budget to a sustainable financial plan
6. Mandated disclosures and the new role of the Internet
7. Essential questions every audit committee should ask

*For donors, volunteers, or managers thinking about joining a board:*

8. Joining a board – what you can bring to the table
9. Joining a Foundation Board – what you bring to the table

### Who Should Attend

These programs are useful for nonprofit and foundation managers and board members with little time but a strong desire to be exposed to useful tools that can be immediately applied.

### Benefits of Attending

In one hour, your participants can have a useful set of tools that they can immediately apply. The concise program guide is an effective way to take the information back to the office with your individualized notes and a clear set of actions you can take immediately as a result of the workshop.

### Attendee comments

“well organized with clear focus”...“practical advice”

### How to Start

See the other side for implementation details or visit  
[www.linkingmissiontomoney.org/board\\_seminars.html](http://www.linkingmissiontomoney.org/board_seminars.html)

(continued on other side)

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## *Information on how to get started*

### **Minimum/Maximum Number of Participants**

These programs are designed to be effective in groups of eight to one hundred.

### **Format of Workshop**

Each topic offered is an informal discussion of two to four key issues in nonprofit management or governance. The workshop leader introduces the key points, terms, or tools in the program guide and, through questions and examples, discusses the key issues with the participants. In very large groups, overhead projectors may be used to facilitate engagement by all participants.

The number of questions and examples that are introduced for each issue by the workshop leader is the key to enabling the program to fit within the time available to the participants. The program has been shown to be effective within time limitations as short as 60 minutes to as long as 2 hours.

Each workshop concludes with a number of do-it-now action recommendations that participants can immediately apply in their own organizations.

### **Materials Provided**

Your participants will receive a program guide that

- summarizes the key concepts and tools covered in the workshop,
- provides informative web links, and
- details a set of do-it-now action recommendations that can be immediately applied in each of your participants' nonprofits.

### **Advance Preparation**

You choose which of the topics offered you wish covered in your meeting and tell us how many people you expect to attend. No other advance preparation is needed for these workshops.

### **Cost of Seminars**

The fee for a Focused Discussion is \$2,500 plus travel expenses. Special rates are available for two workshops presented on the same day and for workshops delivered near our offices in Columbus, Ohio. Please call us for a quote for customized presentations, presentations outside central Ohio, or a package of Focused Discussions you select.

Since these workshops are designed to fit within regular board or staff meetings or to function as informal brownbag programs onsite, any administration, facility, or refreshment expenses are the responsibility of the host.