

UNIDOS US

20 FALL  
24 AFFILIATE  
CONVENING



OUR TIME IS NOW: TRANSFORMING COMMUNITIES TOGETHER

*Our Time is Now!*

FALL CONVENING 2024

# NAVIGATING FINANCIAL MANAGEMENT FOR SMALL NONPROFITS

WITH NATALIA RODRIGUEZ + ARIEL SADE





# WHAT TO EXPECT

We are here to explore non -profit financial practices for long -term sustainability and effective grant management.

Come ready to listen, learn and share!



# ACTIVITY #1

## 1) IN ONE WORD or PHRASE

*What is your greatest challenge in financial management? What question do you have on financial management?*

## 2) TWO STICKY NOTES

*Write one word/phrase on each sticky note*

## 3) SHARE OUT

*Share what you wrote down and why. Stick on the poster.*



# Example

1 Sticky Note (Challenge): " Board engagement."

1 Sticky Note (Question) "How many months of operating reserve is enough?"



# PEER SHARING + LE

## 1) REVIEW LIST

## 2) PICK 2-3 CHALLENGES/QUESTIONS

*Pick 2-3 items you want to address and add them to the poster.*

## 3) PROBLEM SOLVING

*Discuss possible solutions or recommendations.  
Once you discuss, write down 1 -2 potential solutions for each challenge/question selected.*

## 4) ROTATE

# RESOURCES

## Propel Nonprofits

(<https://propelnonprofits.org/>)

### Sample Trainings

- Fundamentals of Nonprofit Finance
- Managing Cashflow
- Preparing for a Nonprofit Audit
- Treasurer/Finance Committee: Right People, Right Roles

### Templates

- Budgeting Checklist
- Board Roles and Responsibilities
- Cashflow template

## What else?