



SISTERS OF CHARITY FOUNDATION  
of South Carolina

## Learning Academy

# Money Matters: Keys to Financial Management

## Philosophy

As good stewards, it is the desire of the Sisters of Charity Foundation of South Carolina to provide a diverse population of nonprofit organizations addressing poverty in South Carolina with the opportunity to expand their skills and knowledge and enhance educational access, while cultivating personal and organizational responsibility and capacity.

The purpose of the Foundation's Learning Academy is to leverage training and educational opportunities for the capacity building needs of multiple nonprofit organizations in the state of South Carolina.

The Learning Academy strives to develop intentional individuals and organizations who are empowered, informed and responsible, provide learning environments that integrate emerging trends and innovation and promote continuous learning.

## Who Should Apply?

This workshop is designed for Executive Directors, Financial Managers, Board Treasurers or other individuals who have the primary responsibility of financial management of a nonprofit organization.

## About the Workshop

*Tuesday, October 12 from 10 a.m. -4 p.m.*

*Sisters of Charity Foundation of South Carolina Office*

This interactive workshop provides individuals with the tools and resources to demonstrate excellence in the area of nonprofit financial management.

At the end of this course participants should be able to identify tools for better financial management; understand financial management best practices; improve their organization's transparency and accountability; work with their auditors more effectively when preparing for an external financial audit; prepare the new Form 990 and identify key performance indicators in their nonprofit organization.

Participants will leave this workshop with financial management tools and templates in several areas of financial management including reporting, tax and regulatory compliance, budgeting and cash flow management and outlines for the development of a financial management policies and procedures manual.

## About the Facilitator

*Jackie F. Breland, CPA*

Jackie F. Breland is a certified public accountant and financial consultant with over 23 years of financial experience. She provides a variety of financial services to clients in the nonprofit, governmental and small business for profit sectors in South Carolina. Jackie works with small to medium-sized organizations to provide assistance in building financial capacity.

To allow more interaction and learning opportunities, each workshop is limited in size. Participation in the workshop is determined by a selective process. The selection process requires the submission of a completed application form for each person seeking attendance.

Please mail, fax or e-mail your application to Katrina Spigner at the Sisters of Charity Foundation of South Carolina:

2711 Middleburg Drive | Suite 115 | Columbia, SC 29204  
o: 803.254.0230 | f: 803.748.0444 | [kspigner@sistersofcharitysc.com](mailto:kspigner@sistersofcharitysc.com)

**APPLICATION DEADLINE:  
September 24, 2010**

Applicants will be notified of decisions  
September 29, 2010.



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Learning Academy

## Money Matters: Keys to Financial Management

Name \_\_\_\_\_

Current Position/Title \_\_\_\_\_ Years with Organization \_\_\_\_\_

Organization \_\_\_\_\_ Age of Organization \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_

Does your organization have a 501(c)3 nonprofit status?    \_\_\_ Yes    \_\_\_ No

How did you hear about this workshop? \_\_\_\_\_

Brief overview of the work of the organization \_\_\_\_\_

Organization's Mission \_\_\_\_\_

Operating Methods (A brief explanation of how the organization works.) \_\_\_\_\_

Annual Operating Budget \_\_\_\_\_

Funding (A description of where the organizational funding comes from, with percentage breakdowns where available.) \_\_\_\_\_

\_\_\_\_\_ Grants \_\_\_ Events \_\_\_ Annual Donors \_\_\_ Other \_\_\_

Governance (An explanation of how the organization is run, to whom it is answerable and how it forms policy.) \_\_\_\_\_

Geographical Spread (The counties in which the organization is active, the presence of regional offices, the number of staff employed and the headquarters location.) \_\_\_\_\_

How does your organization (through mission or project) address poverty in South Carolina? \_\_\_\_\_

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Do you have 501 (c) (3) nonprofit status? Yes \_\_\_ No \_\_\_

Are you registered with the Secretary of State? Yes \_\_\_ No \_\_\_

Do you have a Board of Directors? Yes \_\_\_ No \_\_\_

If so, how many members? \_\_\_\_\_

Do you have an employer identification number? Yes \_\_\_ No \_\_\_

Do you prepare internal financial statements for review by the Board? Yes \_\_\_ No \_\_\_

How often do you prepare your internal financial statements? Monthly \_\_\_ Quarterly \_\_\_ Annually \_\_\_

Do you compare your actual financial results with your budget? Yes \_\_\_ No \_\_\_

Do you compare your actual financial results with prior periods? Yes \_\_\_ No \_\_\_

Are the internal financial statements prepared in accordance with GAAP (generally accepted accounting principles)? I'm not sure \_\_\_ Yes \_\_\_ No \_\_\_

Do you have an annual external financial audit performed by an independent Certified Public Accountant? Yes \_\_\_ No \_\_\_

Do you have a written financial policies and procedures manual? Yes \_\_\_ No \_\_\_

Do you file an annual Form 990, Form 990-EZ or 990-N? Yes \_\_\_ No \_\_\_

If Yes, which form is filed: \_\_\_\_\_

Give us a few examples of internal controls that you have in place in your nonprofit organization:

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