



Non Profit Organizational Support Workshops Available

Workshop Categories

1. Board Development
2. Policies and Procedures
3. Succession Planning
4. Volunteer Management
5. Internal Controls
6. Business Management Overview (Board or Staff)
7. Business Continuity Planning

Discription: Board Development

- Typical Problems
- Get the Right Board
 - Recruiting
 - Committees
- Helpful Tools
- Meetings and Agendas
- Sustainability
- Planning
- Organizational Fundamentals
- Relationships
 - ED and Board
 - Board and ED
 - Community
- Planning Tools
 - Strategic Plan
 - SWOT
 - Needs Assessment
- Organizational Structure
- Building Alliances

Discription: Policies and Procedures

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- Non Profit Economic Presence
- Non Profit Financial Impact
- Competition for Funding
- IRS 990 Disclosure Req'ts.
- Systems Checklists
- How-To" Tools
- Organizational Structure
- Records Retention
- Required Records
- Financial Controls
- Financial Compliance
- Financial Transparency
- Board's role in Financial Mgmt.
- Other required Policies
- Gift Policy
- Email Voting
- Social media
- Telecommuting & Flex Work
- Conflict of Interest
- SWOT
- Planning & Schedules

Description: Succession Planning

- Types
- Levels
- Insights
- Board's Role
- Exec. Director's Role
- Communication
- Plan Development
- Time Line
- Recruiting & Hiring
- Transitioning

Description: Volunteer Management

- Why people volunteer
- Motivations
- Types of Volunteer
- Reasons for Volunteers Leaving
- Volunteer Practices
- Preparing for Volunteers
- Principles
- Impact on Staff
- Privacy and/or confidentiality
- Job Descriptions

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- Recruitment
- Matching Volunteers to Jobs
- Communication
- Volunteer Training
- Orientation
- Policy and Procedures
- Recognition
- Challenges

Discription: Internal Controls

- Introduction
- What is Internal Control
- Reasonable Assurance
- Objectives
 - Financial Information is Recorded and Correct
 - Effectiveness & Efficiency in Operations
 - Compliance with Laws and Regulations
- Why do Frauds Occur
 - Motive/Pressure
 - Opportunity
 - Attitude
- Issues due to Lack of Proper Internal Control
 - Poor Segregation of Duties
 - Poorly Designed Records
 - Lack of Effective Reconciliations
 - Lack of Periodic Verification
 - Poor Supervision
 - Assets & Records not properly secured
- Evaluating Internal Controls
 - Management Objectives
 - Essential Elements of Internal Controls
 - Limitations of Internal Controls
 - Responsibility for Internal Controls
 - Auditor's Responsibility
- Management's Objectives and Responsibilities
 - Effectiveness
 - Efficiency
 - Economy
 - Compliance
 - Financial Reporting
- The Control Environment
 - Management's Attitude and Example
 - Communication of Importance of Controls
 - Role of the Independent Auditor
 - Audit committee

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- Qualified Staff
- Risk Monitoring
 - Assignment of Responsibility
 - Change as an indicator of Risk
 - Inherent Risk
- Control Related Policies and Procedures
 - Task of the Accounting System
 - Implicit Assertions
 - Control Related Policy and Procedures
 - Authorizations
 - Records Design
 - Security of Assets
 - Segregation of Duties
 - Periodic Reconciliations
 - Analytical Review
- Information and Communications
 - Meeting informational needs
 - Communications
 - Accounting Policy and Procedures Manual
- Monitoring
 - Reasons for Monitoring
 - Ongoing Monitoring
 - Separate Evaluation of Controls
- Evaluating controls for Accounting and Financial Reporting
 - Identify Control cycles
- Vulnerability Assessments
- Documentation of How Transactions are Processed
- Creating Documentation
- Identify Potential Risks
- Testing Internal Controls
- Causes of Fraud
- Cost of Fraud
- Fraud Detection
- "Red Flags"
- Investigating Fraud
- What to Do if Fraud is Suspected

Discription: Business Management Overview (NP Certificate Class)

- Non Profit Economic Impact
- Non Profit Competition
- Organizational Structure
- Mission Statement
- Vision Statement
- Organization Charts
- SWOT Analysis – (What, Why and How)

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- Strategic Plan – (What, Why and How)
- Strategic Plan Examples
- Operations Plans
- Marketing – (What, Why, Issues and Goals)
- Organizational Fundamentals
- Fundraising Plans – (What and Why)
- Needs Assessments
- Board Development
- Employee Manuals
- Policies and Procedures
- Advisory council
- Systems Checklists
- Records Retention
- Compliance Issues
- Financial Management
- Reference Materials

Discription: Business Continuity Planning

- How prepared is your Organization?
- Operations
- The Plan
- Benefits of a Plan
- Launching the BCP Project
- Creating the Project Team
- Educating the Staff
- Reviewing Missions & Business Functions
- Maximum Acceptable Downtime
- Identify Sources of Interruption
 - Historical
 - Geographic
 - Technological
 - Human Error
 - Physical
- Relating Service Delivery to Business Function
- Conducting a Business Impact Analysis
- Determining the Level of Impact
- Developing Needed Policies & Procedures
- Determining Which Policies & Procedures are Needed
- Reviewing Existing Documents
- Build off Other's Documents
- Essential Policies for all BCP's
- Creating a Written Plan
- Creating a Table of Contents
- The "Need To Know" Version of the Plan
- Distribution of the Plan

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- Testing & Maintaining your Plan
- Testing Approaches
- Debriefing Participants
- Plan Maintenance
- Inspiring a Continuity Culture.

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