

Advanced Financial Administration in Nonprofits

Course Curriculum

WELCOME

- Welcome to Optimizing Fundraising Efforts in Nonprofits
- Literacy Support
- Curriculum and Course Dates
- Disclaimer
- Policy: Downloadable Content and Access to Materials
- Tuition Tax Credits - CRA Form T2202
- How to Use This Course
- Course User Guide
- On-Lesson Discussions

Module 1: Strategies for Building Financial Capacity

- Lesson 1: Diversification of Revenue
- Lesson 2: Types of Revenue Streams
- Video: Revenue Diversification: What's Possible
- Lesson 3: Action Plan to Diversify Nonprofit Revenue Streams
- Lesson 4: Building and Maintaining an Emergency Fund
- Lesson 5: Smart Investment Strategies for Balancing Growth and Liquidity
- MODULE 1: QUIZ

Module 2: Principles of Budgeting and Financial Planning

- Lesson 1: Types of Budgets
- Group Discussion: Mandatory
- Lesson 2: Blended Budgets
- Lesson 3: Choosing the Right Budgeting Style
- Assignment #1: Determining the Best Budget Type
- Lesson 4: A Five-Step Guide to Budget Development
- Lesson 5: Monitoring and Adjusting Budgets for Financial Stability
- Lesson 6: Steps in Monitoring and Adjusting Budgets
- MODULE 2: QUIZ

Module 3: Guidelines and Compliance for Gifting Receipting

- Lesson 1: Regulations and Guidelines for Gifting and Receipting
- Lesson 2: Electronic Receipts
- Lesson 3: Legal and Ethical Considerations in Gifting
- Lesson 4: Impact of Tax Rules on Charitable Contributions
- MODULE 3: QUIZ

Module 4: Financial Reporting, Transparency, and Accountability

- Lesson 1: Types of Financial Reports and Their Purposes
- Lesson 2: Advanced Reporting: Metrics and KPIs
- Lesson 3: Board Responsibility for Financial Administration
- Lesson 4: Periodic Reviews and Audits
- Lesson 5: Top Ten Compliance Issues for Canadian Registered Charities
- Lesson 6: Financial Policies and Procedures Overview
- Lesson 7: Financial Management Policies and Procedures
- Lesson 8: Risk Management
- MODULE 4: QUIZ

Module 5: Preparing and Filing Regulatory Returns

- Lesson 1: Overview Preparing and Filing Regulatory Returns
- Lesson 2: Completing Form T1044 Non-profit Organization Information Return
- Lesson 3: Completing Form T2 Corporate Income Tax Return
- Lesson 4: Completing Form T3010 Registered Charity Information Return
- Lesson 5: Completing Your 3010 Online
- MODULE 5 QUIZ

WRAP UP

- Reflection Assessment: Advanced Financial Administration for Nonprofits
- Course Completion