Background
The DeKalb County Nonprofit Partnership (DCNP) is pleased to offer the Dollars & Sense: Nonprofit Finance Initiative. This Initiative is available to participating organizations at no financial cost. It is a progressively more intensive experience to accommodate a variety of organizations, including:

1. **Dollars & Sense: Nonprofit Finance Initiative Workshop**
   a. This training covers financial terminology and definitions, budgeting, forecasting, cash flow management, financial statements, and includes real-world examples to provide context for all. Both finance veterans and non-finance staff and board members are welcome!

2. **Dollars & Sense: Nonprofit Finance Initiative Consulting**
   a. Through a competitive application process, up to five (5) organizations will be selected by an ad hoc committee to receive financial management technical assistance and consultation.

Consultant
Betsy Hull, CPA, MPA, Northern Illinois University Director of Strategic Initiatives and Innovative Practices, serves as the consultant providing technical assistance and consultation services to the selected organizations. She has extensive experience working with nonprofit organizations of all sizes as a volunteer, board member, staff (former Finance Director of the DeKalb County Community Foundation), and consultant. Betsy has taught at NIU, authored case studies on nonprofit finance, and collaborates regularly with DCNP, including during Give DeKalb County.

**Dollars & Sense: Nonprofit Finance Initiative Consulting Details**
**Initial Meeting & Project Identification:** After organizations are selected to participate, each organization is responsible for scheduling a meeting with the consultant for an initial meeting. The purpose of this discussion is to build relationships, share relevant financial information, and discuss the project topic, scope, deliverables, timeline, and next steps.

**Consultation:** The consultant will begin work on the project as defined. Written observations and recommendations will be developed by the consultant and shared with each organization.

**Implementation & Wrap-Up:** Approximately two months after receiving recommendations, the organization and consultant will reflect and discuss what specifically has been done to move the recommendations to action. A final evaluation will be distributed to participants to capture their feedback, experiences, testimonials, and outcomes.

*The consultant is not intended as a short-term substitute for regular/ongoing bookkeeping tasks. This is a consulting engagement to provide advice, review/create systems, and offer meaningful recommendations to enhance your financial processes.*

**Approximate Timeline**

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<th>Activity</th>
<th>Who is Responsible</th>
<th>Approximate Timeframe</th>
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<td>Workshop</td>
<td>DCNP</td>
<td>August 30, 2023</td>
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<tr>
<td>Consulting Application Period</td>
<td>DCNP</td>
<td>August 21 – September 6, 2023</td>
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<tr>
<td>Select Participating Organizations</td>
<td>Ad Hoc Committee</td>
<td>September 2023</td>
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Approximate Time Commitment
The time commitment will vary by organization and will be spread across multiple months. The following is the estimated time commitment that an organization might expect.

Dollars & Sense: Nonprofit Finance Initiative Workshop………………..6 hours
Initial Meeting with Consultant………………………………………………...1.5 hours
Consultation Period
  Responding to Consultant Inquiries……………………………………..1 hour
  Providing Documentation/Information……………………………………..1 hour
  Individual Meetings with Consultant……………………………………...2 hours
  Review Recommendations with Consultant…………………………..1 hour
Implement Recommendations………………………………………………January – February
Wrap-Up Meeting……………………………………………………………..1 hour
Program Evaluation and Testimonial…………………………………………1 hour
TOTAL………………………………………………………………………………14.5 hours (plus implementation)

Project Selection
Participating organizations will select a project for the Consulting engagement. These projects will range widely among participating organizations. Below are some examples to consider—these are not meant to influence your decision and this list is not exhaustive:

- Budgeting Assistance
- Segregation of Duties Guidelines
- QuickBooks Training/Setup
- Creating Financial Efficiencies
- Policy Assistance

Eligibility
All current DCNP members are invited and encouraged to attend the Dollars & Sense: Nonprofit Finance Initiative Workshop. Organizations eligible to apply for the Consulting experience are:

1. Current DCNP members.
2. 501(c)3 nonprofit organizations located in or serving DeKalb County.

Checklist of Considerations
Organizations considering an application should carefully consider these questions:

☐ Do we have the time, capacity, and willing mindset as an organization to meaningfully engage in this work?
☐ Is our leadership (e.g., Executive Director, Finance Staff) able to commit to participating? Or, if you are an all-voluntary organization: Is our Board Chair, Treasurer, and/or Board Vice-Chair able to commit to participating?
☐ Are we ready to receive honest and candid feedback that may be critical or questioning?
☐ Is our organization committed to improving our financial management and/or financial processes?
☐ Are we prepared to act on the recommendations and make changes in our organization?
☐ Are we willing to share what we learned and acted upon in this experience with DCNP and its members by completing an evaluation and testimonials?
Application Information
Applications are due by noon on September 6, 2023. Applications must be submitted online. The Ad Hoc Selection Committee will make decisions and applicants will be notified electronically or by phone. DCNP staff may contact applicants for further information and/or to discuss application materials. Contact DCNP Director, Ben Bingle, with questions at: ben@dekalbccf.org.

Nondiscrimination Policy
No person in the United States shall, on the basis of actual or perceived race, color, religion, national origin, sex, gender identity (as defined in paragraph 249(c)(4) of title 18, United States Code), sexual orientation, marital or parental status, political affiliation, military service, physical or mental ability, or any other improper criterion be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity funded in whole or in part with funds made available by the DeKalb County Community Foundation, and any other program or activity funded in whole or in part with funds appropriated for grants, cooperative agreements, and other assistance administered by the Community Foundation.