MERCURY

NGO Financial Planning and Budgeting Training Course

5 – 9 July 2027
Geneva (Switzerland)

Dubai - UAE: +971 4 450 5697
Istanbul - Türkiye: +90 539 599 1206
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NGO Financial Planning and Budgeting Training Course

Ref: 15327_1079849 **Date:** 5 – 9 July 2027 **Location:** Geneva (Switzerland) **Fees:** 6500 Euro

Introduction:

This module offers a practical guide to financial planning and budgeting in an NGO context. By examining accurate project budgets and employing financial planning and budgeting tools, participants will appreciate the importance of crafting accurate, comprehensive, and justified budgets for efficient program management.

The intersection of program and finance teams is crucial for developing and overseeing NGO budgets, ensuring the budget's alignment with the organization's strategic goals. In this comprehensive NGO financial planning and budgeting course, participants will explore the intricacies of financial planning and budgeting in the NGO sector.

The NGO financial planning and budgeting program enriches students' understanding of NGO financial management. It emphasizes the financial planning and budgeting process while equipping them with a suite of financial planning and budgeting tools. The goal is to enable those involved in NGO operations to develop robust NGO budgets, ensuring that their financial planning aligns with organizational objectives.

Through this NGO financial planning and budgeting training program to improve financial competency, participants will gain the expertise required for proficient budgeting and financial planning, ultimately leading to a highly regarded NGO certification course.

Course Objectives:

Participants in this NGO financial planning and budgeting course will:

- Complete an activity-based budgeting-based project budget that is accurate, complete, and justified.
- Create budgets in various donor formats to go with funding requests
- Make incremental budgets for implementing the program.
- Describe the budgeting and budget management processes that the Chart of Accounts supports.
- Manage programs with financing from several donors by using a funding grid.
- Describe at least ten different budget kinds and three different budget-setting strategies.

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Targeted Groups:

- Employees of humanitarian organizations field coordinators, administrative/financial support staff, etc. who must manage finances or organize initiatives.
- Administration of NGOs.
- Those in charge of starting charitable organizations or projects must plan their finances.
- Project managers and other NGO personnel interested in budgeting and financial planning.

Targeted Competencies:

Target competencies in this NGO financial planning and budgeting training will able to improve:

- Understand nonprofit financial regulations and compliance.
- Develop strategic financial plans aligned with organizational goals.
- Create and manage detailed annual budgets.
- Implement effective financial reporting and analysis.
- Utilize fundraising and grant management for budget sustainability.

Course Content:

Unit 1: Essential Financial Planning Principles and Ideas:

- Explore Financial Preparation.
- Set the Stage for Your Financial Planning.
- Reflect on Your Past Budgeting Experience.
- Understand the Chart of Accounts.

Unit 2: Activity-Based Budgeting Introduction:

- Practice using the Project Breakdown Sheet and the Budget Worksheet, two essential tools.
- Budget based on activities.
- Activity-based budgeting: Methods and Resources.
- The Project Breakdown Sheet's compilation.
- Examine and Represent the Budget.

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Unit 3: Developing a Phased Budget:

- Consider the Indirect Cost Budgeting Process.
- Understand Phased Budget, Consolidated Budget, and Full Cost Recovery.
- The Complete Project Costing Method.
- Create a Phased Budget from the Consolidated Budget.

Unit 4: Donor-Format Budgets and Cash Flow Projections:

- Also, program management alternatives for multi-donor-supported programs should be taken into account.
- Program Management Budgets.
- The anticipated cash flows.
- Creating a Budget in Donor Format.
- Financial Grid.

Unit 5: Financial Monitoring and Evaluation:

- Intro to Financial Monitoring and Evaluation.
- Importance of Monitoring Budget Implementation.
- Techniques for Tracking Expenditures and Income.
- Evaluate Financial Performance Against Budget Targets.
- Adjust Budgets Based on Monitoring and Evaluation Findings.

Conclusion:

By the end of this training, participants will not only understand what financial planning and budgeting entail but also the importance of these practices in ensuring the stability and sustainability of an NGO. Attendees will leave with the skills needed to execute budgeting and financial planning effectively within their organizations.