

Surplus for Purpose

A Two-Day Immersive Workshop in

Not-for-Profit

Financial Resilience and Systemic Impact



Overview

Big Picture and the Imperative for Change. Economic context, trends in demand and funding, sector trends and uncertainties. Strategic findings and learnings ICDA/Inovyse survey. Participant perspectives and discussion.

Drivers of Change. Introduction to the drivers of change in the NFP sector. Surveys to understand the DNA of the organisation. Including its vulnerability to a changing environment. Self-diagnostic exercises and discussion.

Benchmarking Tables. Detailed operational and financial benchmarks, by NFP type. Insights and learnings. How to leverage benchmarks to understand organisational health and guide objectives setting. Comparison to participant NFP including self-diagnostic exercises and discussion.

Surplus and NFP Viability. Understanding the drivers of NFP surplus (revenue sources, scale and footprint, mission drift, fit and alignment, risk engagement). Tools and frameworks to assess financial health, risks to surplus, and organisational capability to generate sustained surplus. Tools and frameworks to assess NFP viability, including program and service health, fit, and alignment. Exercises, learnings, and discussion.

Mission Growth and Scale. Tools and frameworks to efficiently define the *optimal* mission and goals. Integration with operational and financial objectives and strategies. Assessing the viability and fit of existing programs and services. The difference between scale and growth, and implications. Tools and frameworks to develop and assess options for scale and growth. Exercises for participant NFPs. Diagnostics and discussion.

Funding the Organisation. Understanding the science of giving to maximise donations and philanthropy. Pricing strategies in the NFP sector to maximise revenues and surplus. Pricing strategies to maximise success in tenders and funding proposals. Strategies, tools, and frameworks to maximise cost recovery. Reframing the 'overhead' narrative. Preparing and engaging with outcome-based funding. Pricing and revenue exercises and options development for participant NFPs.

Scenario Mapping and Managing Strategic Risk. Tools and frameworks to anticipate and manage sector change and volatility, esp. in funding. Tools and frameworks to create organisational and sector scenarios for strategic planning, systemic impact, and funding resilience. Scenario mapping for participant NFPs.

Managing for Purpose. Beyond weak and undifferentiating mission/vision/purpose statements. Developing a culture of outcomes and purpose. Establishing and implementing customised, engaging, and relevant evaluation frameworks. Tools, evaluation frameworks, processes for engagement and implementation. Review of current statements, purpose, and desired outcomes of participant NFPs.

Who will Benefit

- ✓ Directors, CEO, CFO, COO with close and direct involvement in the NFP
- ✓ General managers, strategy, policy, operational, and regional managers
- ✓ Programs and services managers, fundraising, research, and advocacy managers