

# U.S. Programs

## Analyzing Grantee Budgets & Financial Information Workshop

**All USP staff invited**  
**Thursday, August 27, 9am-12pm**  
**Conference Room 3B**

Led by Barbara Miller from Management Solutions for Nonprofit Organizations, this workshop will give staff guidance and practical information on how to read and analyze a grantee's budget and financial statements (audits, federal form 990). Topics covered will include:

- How to assess a proposed budget
- How to use an organization's financial statements to assess their financial strength
- How to identify financial problems – “warning signs” and how to react

The discussion will be informed by real-life experiences and challenges faced by USP staff. This session is especially recommended for program staff.

### **AGENDA**

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|---------------|--|
| 9:00 – 9:05   | Welcome and Introductions  |
| 9:05 – 10:30  | Evaluating Grantee Budget Information <ul style="list-style-type: none"><li>• Reviewing a sample budget narrative – What would you expect the budget to include?</li><li>• Reviewing a sample budget – How to test the proposed expenses to gauge how realistic they are?</li><li>• Resources: Grants Management document on “Reviewing project/organizational budgets”</li></ul>                          |
| 10:30 – 10:40 | Break  |
| 10:40 – 11:55 | Interpreting Financial Statements: Audits, Federal Form 990<br>Reviewing a sample 990 and audit to address the following questions: <ul style="list-style-type: none"><li>• What are these two basic financial statements? What information can be found on each?</li><li>• The language of accounting - What do the terms mean?</li><li>• What are the indicators of financial health/problems?</li></ul> |
| 11:55 – 12:00 | Completion of workshop evaluation form   |

## **FACILITATOR BIO**

### **Barbara S. Miller**

Barbara S. Miller is a Senior Partner in *Management Solutions for Nonprofit Organizations, LLC* which provides consulting, training and management services in the areas of strategic planning, financial management, board development, fundraising and overall organizational development. Prior to joining Management Solutions, Ms. Miller was Senior Staff Consultant at Support Center for Nonprofit Management in New York, NY.

Ms. Miller has developed strategic plans with health and human service agencies, arts organizations, library systems, literacy groups, public health departments, early childhood learning organizations, among many other types of nonprofit organizations. Her work with nonprofit boards has helped board members clarify their roles, develop structures for making the most of their individual time and expertise, and develop collaborative relationships with staff. Through training and consulting in financial management clients have been able to develop and understand budgets and financial reports, and to use financial information to enhance organizational decision making.

Beyond her consulting work, Ms. Miller has reviewed and contributed to several publications on strategic planning and financial management for nonprofit organizations. Ms. Miller was also a founding board member of Governance Matters (formerly Alliance for Nonprofit Governance,) a collaborative of funders, educators, consultants, umbrella organizations, and academics committed to increasing the effectiveness of board governance in New York. Ms. Miller received her undergraduate degree at Stanford University and earned an MBA at the University of California, Los Angeles - Anderson School of Management