



## Consulting Program:

# Strategic Financial Planning Cohorts

### Description:

The COVID-19 crisis presents grave challenges to non-profit leaders. With disruptions to funding sources and operations, and the looming possibility of a recession, organizations need to prepare and respond. In this virtual program we guide organizational leaders through a collective planning process that combines analysis, coaching, expert advice and development of peer support channels, as participants navigate the emerging situation. This approach is based on established PIM management consulting methods developed and refined over two decades.

This program is offered to cohort groups ranging from 5-20 organizations. Cohorts may be organized by geography, service population or peers with common service types. Groups will be organized by a host organization, and consulting fees may be subsidized by grant funding.

Teams of 2-3 organizational leaders will join facilitated cohort groups, which will receive financial leadership training and hands-on technical assistance based on case studies and current experience. Participants will utilize a common planning framework. Each organization will receive individualized financial analysis, guidance on planning scenarios, reviews of plan concepts and guidance through initial implementation.

### Outcomes:

Participating organizations will leave the program with:

- Tangible knowledge and skills in strategic financial management
- A multi-year strategic financial framework for their organization
- A scorecard tool integrating key financial, operational and program metrics
- Individualized support through an initial implementation period
- A peer support network with common financial training and experience.

### Lead Consultant:

**Scott Schaffer**, Principal of PIM Consulting Canada, is a non-profit sector thought leader on financial health and sustainability. As past CEO of organizations in the health, housing and environmental fields, he's led financial turnarounds and build resilient organizations. As a management consultant, he's helped over 100 non-profits chart courses toward financial health. Scott has a background in finance, economics and behavioral science, and has led a workshop called *Strategic Financial Management for Nonprofit Executives* in the U.S. and Canada.

### Timeline:

The process from start to completion of plans will be an estimated three months. Coaching and facilitated support discussions will continue over an additional six months.

### Contact:

Amanda Prasow, [amanda@pimgconsulting.com](mailto:amanda@pimgconsulting.com)