

Not-for-Profit (NFP) organizations are as unique as the people and communities they serve. Yet many of the challenges NFPs face are common to all. Avail CPA's NFP Insight group is specialized in helping not-for-profits in all sectors become efficient, excellence-focused organizations. Through our carefully planned improvement areas we will review key aspects of your organization, identify and remedy organizational weaknesses, and recommend improvements to promote successful operations.

1

### Leadership and Governance

We take an in-depth look at your Board/Council to assess minutes and meetings; size, composition, and committees; policies and by-laws; and financial reporting and budgeting. We review competencies and self-assessment as well as management oversight and appropriateness of insurance.

2

### Strategic Planning

Develop a plan based on your organization's mission, vision, and core values to identify, document, and communicate your goals and success. We suggest benchmarking, monitoring, and measurement tools, identify key performance indicators, and help you with mid-range and long-range planning.

3

### Internal Controls

Keep your organization safe through a fraud risk assessment of internal controls and best practices in areas of sales/receivables, purchases/payables, capital assets, inventory, payroll, credit cards, and electronic fund transfers.

4

### Human Resources

From recruiting to employee exit and everything in between our team will help you with job descriptions, evaluations, contracts, policy and procedures manuals, time keeping, labour standards, freedom of information and protection of privacy, and volunteers.

5

### Financial Management

From general reporting, planning and analysis to capital asset, inventory, accounts receivable, and accounts payable, we review best practices and financial planning. Our Insight group will also advise on investment and debt management.

6

### Tax Compliance

Understanding how complex tax laws affect your NFP can be overwhelming. We make it simple by reviewing your corporate income tax return, GST, payroll, NFP/charity returns and making sure you are compliant. We also explain and evaluate taxable benefits and charitable receipting and reporting.

7

### Information Technology

Make sure your staff, client, and financial data is safe through our review of your hardware and software, data security measures, and systems protection. We provide cyber security training to protect your organization from viruses, hackers, and scams.

8

## Enhancements

From bookkeeping to year-end preparation and project-specific decision making, our Insight professionals can be a trusted part of your team. We will provide training on understanding financial statements, effective meetings, and team enhancement, and we can even be your part-time CFO.

9

## Emerging Leaders

Avail Spark consultants help develop the leadership potential in your organization in six 1.5-hour modules in the areas of communication styles, constructive feedback, time management, delegation, crucial conversations / coaching, and goal setting. Open Group sessions are \$1,000 per person (\$500 for each additional person from your organization). Private Group sessions are \$4,500 for up to 12 people from your NFP.

10

## High Performing Board Development Program

Our seven workshops tailored to creating high-performing boards of directors and councils focus on the basics of board oversight and function; internal controls; strategic planning, visioning, and values; budgeting and forecasting; audit committees; policies; and effective executive director functioning and succession. \$1,500 per session or complete all seven for \$7,500.

Prices vary by organization. Let us provide a quote for you.

TIER 1

### Planner

Starting at **\$1,500**

**Assessment and recommendation** in improvement areas 1-7

TIER 2

### Improver

Starting at **\$2,500**

**Assessment and recommendation** in improvement areas 1-7  
**Assistance** to create accountability  
**Advice** and discussion

TIER 3

### Changer

Starting at **\$3,500**

**Assessment and recommendation** in improvement areas 1-7  
**Assistance** to create accountability  
**Advice** and discussion  
Development and **implementation** of plans  
Follow-up and **review** of improvement  
Improvement **Area 8**

Talk to our Avail Insight Team Leaders **Calvin Scott** and **Nadine Granson** today!

[www.availcpa.com](http://www.availcpa.com)

