

# Building a Successful Organization



# **VISION**

- Dream it

# **MISSION**

- Define your mission
  - How you are going to get the vision
- Stick to it

**5  
Management  
Systems**



Service  
Delivery

Finance

Support Services

Public Relations

Personnel

- **Good Leadership with passion for the work**
- **Staff that believe in your mission**
- **According to Gallup. Only 31% of US employees are actively Engaged. 69% are disengaged and 17% are actively disengaged.**
  - **So out of 10 US employees. 3 are actively working, 5 are doing the minimum or quiet quitting and 2 are actively sowing discord.**
- **It is important to recruit, onboard and train actively engaged employees. Or your organization will fail.**

**Personnel**

- **Communicate your mission to**

- **Your Community**
- **Supporting Organizations**
- **Your Competitors**
- **You can be the best in class at everything and if your community, supporters and detractors don't know it, you will fail.**

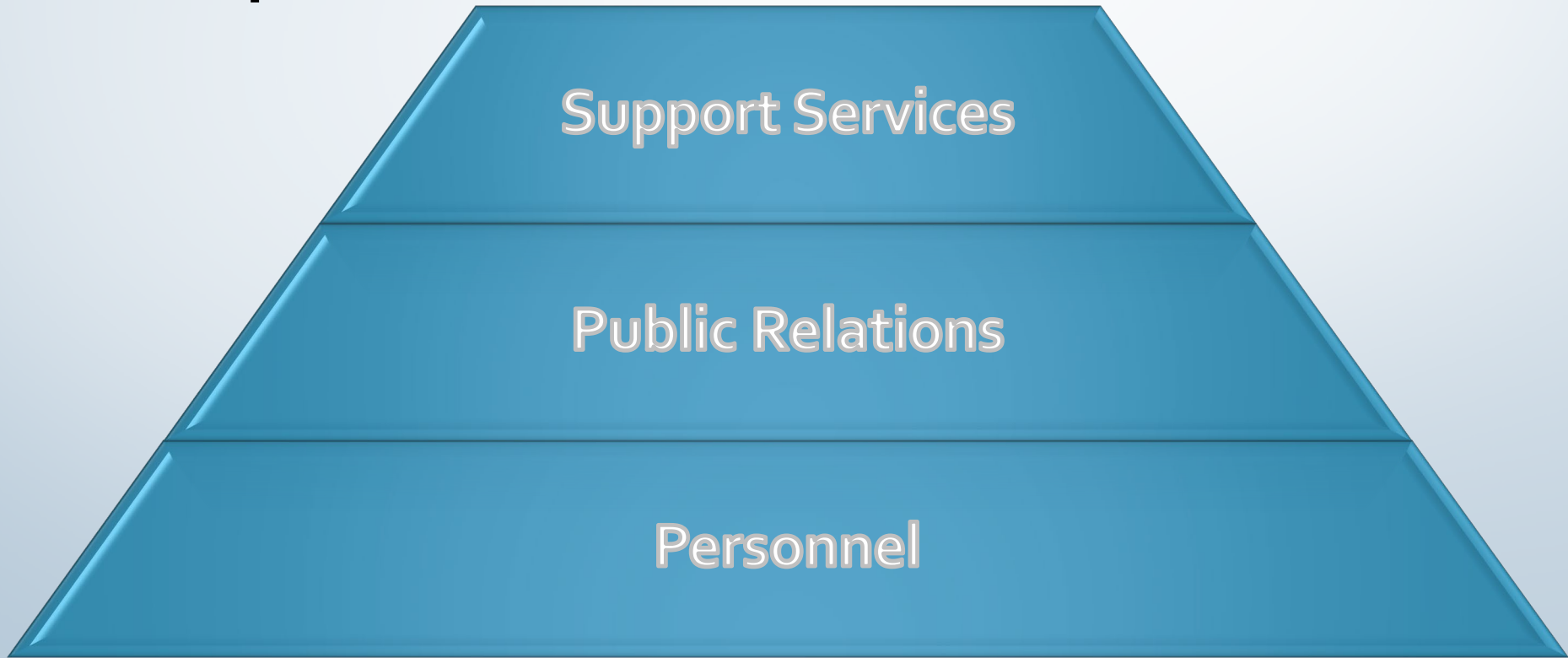


**Public Relations**

**Personnel**

**Without your support service, everything will fall apart**

- **Meetings are organized**
- **Supplies aren't ordered**
- **You run out of coffee, trucks break down, the sewer backs up.**



# • Solid Financial System

- Compliance
- Clean Audits
- Reporting
- Budgets
- Cash Flow
- No money. No Mission



**No Service Delivery**

**No Business**



Service  
Delivery

Finance

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- Service delivery is usually the first system you crank up or you never even get going.
- You can run a small business with just a good service delivery and finance systems.
- If you want to grow, you have to have the other systems or you fail.
- **AND**, if you don't grow, you fail.

# **Policies**

- **Policies are a tool, not a system**

**Use them to make all the systems work**

# **What Policies Do You Need?**

- Personnel
- Financial
- Operations
  - Communications
- Safety

# Other Talking Points

- Those with the best Maps and Plans Win
- In Public Service, those with the best Maps, Plans and Partnerships win.
- Local Work Groups are an NRCS system that TCD's should take advantage of. Learn how.
- The success of the TCD model in Alaska is it forces ANCSA corporations and Tribes to create an operation working together.
- Brucism #614 Collaboration..... Is hard.
- ANCSA Corporations are a huge land base. The biggest farm in the United states is the King Ranch in Texas 825,000 acres. The average farm in Alaska is 742 acres according to the 2022 census of Agriculture.
  - Ahtna registered their land as a farm its 1.528 Million Acres. Twice as big as the largest farm in the US.
- ANCSA Land is 40 million acres. This is 5% of the current US farm land.

# The Foraker Group

The Foraker Group's core purpose is to **strengthen nonprofits**



Educational  
Opportunities



Shared Services



Organizational  
Development



Public Policy



Fiscal  
Sponsorship

## A few signature programs and products:

- Certificate in Nonprofit Management
- Financial Shared Services
- From Bias to Belonging
- Leadership Summit
- Pre Development toolkit
- Economic Impact Report
- Executive Leadership Intensive
- Leadership Transition

# Grant Management: Accounting Tips

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- Note/plan for all deadlines and accounting deliverables
- Cash flow impact: paid in advance vs reimbursable awards
- Build your accounting framework
  - Internal Controls and Policies
  - Set up systems to
    - Track spending by funding source
    - Track indirect costs and recognize revenue
  - Develop routine, consistent reporting and record retention
- Make room in your budget to cover accounting costs

# Grant Management: Audit Considerations

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What is an audit? Why do we need it?

- Financial Statement Audit:

- Independent assurance to determine if your financials are free from material misstatement, presented in accordance with GAAP
- May be required by your board, bylaws, funders

- Single Audits

- Required if you spend more than \$750,000-\$1,000,000 in federal funds (depending on award date before or after 10/1/2024), or \$750,000 in state funds in a fiscal year
- Ensure compliance with laws and grant terms
- Assess internal control systems
- Verify accuracy of financial statements

# Grant Management: Audit Considerations

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- As soon as you know you need an audit, start the process
  - RFPs take time
  - Build the cost into your budget
  - Ask for the PBCs early (and use Foraker's Audit Checklist)
- Track deadlines (9 months to complete single audits)
- Set aside the time, and start early
- If your accounting framework, internal controls, and grants management process are strong, your audit will confirm that.
- Lean into support if needed: partner with an accountant, CPA, or financial shared services provider to navigate the process alongside you.