



MANAGEMENT: AN INTRODUCTION

Monday, 26 November 2018 | 9:00am–5:00pm

Rio Grande Depot, 300 Rio Grande Street, Salt Lake City, UT 84101

Natalie Petersen (Nonprofit Consultant) & Kevin Fayles (Utah Division of State History)
& Greg Davis (Utah Department of Heritage & Arts)

8:30–9:00 am	Arrivals so we can start promptly
9:00–9:15 am	Welcome and Introductions (Everyone) <ul style="list-style-type: none"> Housekeeping, brief introductions, group ground rules Agenda overview and goals for today
9:15–10:00 am	Management Module Overview (Kevin & Natalie) <ul style="list-style-type: none"> What’s in store for the MGMT Module HANDS-ON ACTIVITY #1 Management Standards: The Game Unacceptable MGMT Practices
10:00–11:00 am	Budgeting (Kevin & Natalie) <ul style="list-style-type: none"> Why budgets matter Building blocks for a meaningful budget Checking back with the standards
11:00–11:15 am	BREAK
11:15–12:15 pm	Budgeting – cont’d (Kevin and Everyone) <ul style="list-style-type: none"> HANDS-ON ACTIVITY #2 Moving Toward Your Ideal Budget
12:15–1:15 pm	LUNCH (on your own)
1:15–2:45 pm	Fiscal Responsibility (Kevin & Natalie & Greg) <ul style="list-style-type: none"> Legal and ethical responsibilities around finances Financial health, finance management, safekeeping of assets HANDS-ON ACTIVITY #3 Assess Your Organization’s Financial Management
2:45–3:00 pm	BREAK
3:00–4:00 pm	Sustainability & Fundraising (Natalie & Kevin) <ul style="list-style-type: none"> Working toward sustainability Planning for your financial needs through a healthy fundraising program HANDS-ON ACTIVITY #4 Measuring Fundraising Effectiveness
4:00–4:15 pm	Wrap-up (Everyone) <ul style="list-style-type: none"> Recap of the day, key takeaways Assignment – build your ideal budget, complete fundraising effectiveness exercise
4:15–5:00 pm	Mentor Groups Break-out (Mentors with their 2-3 groups) <ul style="list-style-type: none"> How has today’s content affected your priorities?