



We'll get you there.

CPAs | CONSULTANTS | WEALTH ADVISORS

Transform Your Finance Function

November 8, 2023



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Learning Objectives

- Identify when it makes sense to take a step back to evaluate your financial operations
- Identify approaches to reviewing financial operations
- Recall what other nonprofits have done to begin transforming their finance function



Introductions

Jocie Dye

Principal, Business Opportunity Assessments

CLA

Teresa Kalinowsky

Principal, Business Opportunity Assessments

CLA

Corrie Martin

Chief Operating Officer

Woodwell Climate Research Center

Pam Hicks

VP of Finance and Admin

Florida United Methodist Foundation

Heidi Peterson

Executive Director

Del Norte Neighborhood Development Corporation



BOA Approach and Methodology

The Business Opportunity Assessment (BOA) allows us to live the CLA Promise of really getting to know and help our clients.

Discover

- Documentation Review
- Interviews and Walkthroughs
- Identify Systems Requirements

We take the time to get to know the client and understand the root causes of the pain points that the client is feeling.

Assess

- Evaluation
- Observations
- Recommendations

We review issues, improvement opportunities, and critical success factors to align strategic practices and draft a conceptual target state.

Optimize

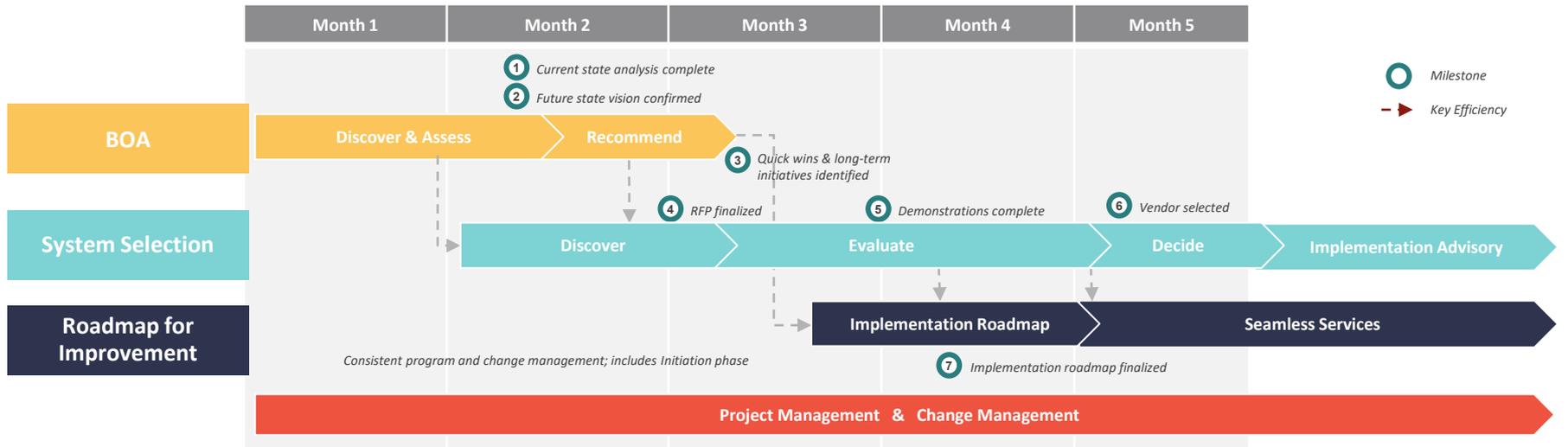
- Prioritize
- Implementation Roadmap
- System Selection and Optimization

We help prioritize opportunities to achieve the future state, create an actionable plan to get there, and determine the 'quick wins.'

Structure • Process • Systems



Integrated BOA and System Selection Approach



Thank you!

Jocie Dye
Principal, Business Opportunity Assessments
267-419-1141
Jocie.Dye@CLAconnect.com

Teresa Kalinowsky
Principal, Business Opportunity Assessments
781-402-6354
Teresa.Kalinowsky@CLAconnect.com



CLAconnect.com



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