ERP for Nonprofits: Fund Accounting Modules Training Course

Professional Development Training Course Outline

Category	Enterprise Resource Planning (ERP)	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today’s data-driven world, nonprofits are under increasing pressure to manage donations, grants, and fund allocations with transparency and accountability. ERP for Nonprofits: Fund Accounting Modules Training Course is designed to empower financial managers, accountants, and nonprofit leaders with the tools and knowledge to implement Enterprise Resource Planning (ERP) systems effectively. This course bridges the gap between technology and mission-driven financial management, ensuring fund integrity, compliance, and donor confidence through modern ERP frameworks.

Through hands-on practice and real-world case studies, participants will explore fund accounting, budgeting, donor management, and compliance reporting using ERP software tailored for nonprofit operations. The course emphasizes automation, data analytics, and performance optimization to enhance financial decision-making and resource stewardship within nonprofit organizations.

Programme Curriculum

ERP for Nonprofits: Fund Accounting Modules Training Course

Introduction

In today’s data-driven world, nonprofits are under increasing pressure to manage donations, grants, and fund allocations with transparency and accountability. ERP for Nonprofits: Fund Accounting Modules Training Course is designed to empower financial managers, accountants, and nonprofit leaders with the tools and knowledge to implement Enterprise Resource Planning (ERP) systems effectively. This course bridges the gap between technology and mission-driven financial management, ensuring fund integrity, compliance, and donor confidence through modern ERP frameworks.

Through hands-on practice and real-world case studies, participants will explore fund accounting, budgeting, donor management, and compliance reporting using ERP software tailored for nonprofit operations. The course emphasizes automation, data analytics, and performance optimization to enhance financial decision-making and resource stewardship within nonprofit organizations.

Course Duration

5 days

Course Objectives

1. Understand the fundamentals of ERP systems for nonprofit financial management.
2. Apply fund accounting principles using ERP modules.
3. Implement donor and grant tracking systems with automation tools.
4. Design real-time financial dashboards for transparency and reporting.
5. Optimize budgeting and forecasting using predictive analytics.
6. Ensure compliance with GAAP and nonprofit accounting standards.
7. Integrate cloud-based ERP solutions for scalability and security.
8. Improve workflow efficiency through process automation.
9. Analyze financial performance metrics for strategic decision-making.
10. Utilize AI-driven ERP analytics for donor insights and trend prediction.
11. Strengthen data governance and cybersecurity within nonprofit ERP systems.
12. Conduct impact measurement through ERP-based performance tracking.
13. Manage multi-fund, multi-program accounting structures effectively.

Target Audience

1. Nonprofit Finance Managers
2. Fund Accountants
3. ERP System Administrators
4. Program Directors
5. Donor Relations Officers
6. Nonprofit CFOs
7. IT & Data Analysts for Nonprofits
8. Grant Managers and Auditors

Course Modules

Module 1: Introduction to ERP for Nonprofits

- Understanding ERP architecture for nonprofit operations
- Mapping organizational needs to ERP functionality
- Data migration and integration best practices
- Key ERP vendors for nonprofit solutions
- Case Study: Implementing ERP in a mid-sized educational nonprofit

Module 2: Fund Accounting Principles

- Restricted and unrestricted funds
- Fund setup and chart of accounts configuration
- Allocation of grants and donations
- Inter-fund transfers and reconciliations

- Case Study: Managing multiple grant sources using fund accounting ERP

Module 3: Donor and Grant Management

- Donor lifecycle and CRM integration
- Grant application and disbursement tracking
- Automation of acknowledgment letters and reports
- Linking donor data with financial systems
- Case Study: Improving donor retention using ERP analytics

Module 4: Budgeting and Forecasting

- Setting up departmental and project budgets
- Variance analysis and predictive forecasting
- Multi-year budgeting strategies
- Integration with fundraising goals
- Case Study: Forecasting outcomes for community outreach programs

Module 5: Financial Reporting and Compliance

- Building GAAP-compliant financial statements
- Automated audit trails and compliance checks
- Dashboard creation for stakeholders
- Custom reporting templates in ERP systems
- Case Study: Audit readiness through ERP-based reporting tools

Module 6: Data Security and Governance

- Protecting donor and financial data
- Role-based access control and encryption
- Backup, recovery, and data retention policies
- Cybersecurity awareness for nonprofit staff
- Case Study: Preventing data breaches in donor management systems

Module 7: ERP Implementation and Change Management

- ERP project planning and stakeholder engagement
- Data migration strategies
- Training and user adoption techniques
- Managing resistance and system feedback
- Case Study: ERP rollout success in a healthcare nonprofit

Module 8: Performance Measurement and Impact Analysis

- KPIs and metrics for nonprofit performance
- Linking financial outcomes to mission objectives
- Real-time dashboards for board reporting
- Using analytics for continuous improvement
- Case Study: Measuring program impact with ERP analytics tools

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com