Course Overview

An effective social sector leader must be able to analyze and act upon financial information as part of an overall approach to achieving social impact. This course will focus on teaching students the application of core financial tools and functions in social impact organizations with an emphasis on using financial information in decision-making. This course will equip students to increase their contributions to social sector enterprises and prepare them for senior roles within these organizations.

Learning Goals

Students will learn the tools and techniques for effective financial management, including pricing, program analyses, budgeting, forecasting and overall business model sustainability. This course will also address the role of philanthropy as it pertains to business model sustainability.

The course is designed to develop and make use of key financial approaches, including:

- full cost recovery
- program profitability
- financial modeling
- responding to grant requests
- use of financial reports to effectively communicate financial data

We will address the real challenges, problems and opportunities of financial management in social impact organizations.

About The Instructor

Brent Copen is dedicated to strengthening the sector by helping nonprofits develop more robust financial management practices. He has presented hundreds of workshops and training nationally to CEO’s, board members, funders and emerging leaders; and has consulted extensively to a wide variety of nonprofits across sub-sectors.

Copen currently holds four teaching positions at U.C. Berkeley. He co-authored The Nonprofit Business Plan, a practical guide to help nonprofit leaders establish a sustainable, results-driven business plan.

Copen is currently the Chief Financial Officer at Tiburcio Vasquez Health Center and the Managing Director of Strategic Financial Solutions. He brings more than 20 years of executive and management experience to the positions, including senior leadership roles at Asian Americans for Community Involvement, La Piana Consulting and Nonprofit Finance Fund. He received a Master in Public Administration degree from Columbia University’s School of International and Public Affairs.