

UGBA 192T.6 - 3 Units

Financial Tools for Social Impact

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:

- pricing
- business line analyses
- 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 social sector businesses develop more robust financial management practices. He has presented hundreds of workshops and training nationally to CEO's, board members, funders and emerging leaders.

Copen brings more than 20 years of executive management and leadership experience, including senior finance roles in technology, health care, management consulting, and community development finance. He was awarded 2018 Bay Area CFO of the Year by the San Francisco Business Times.

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. He received a Master in Public Administration degree from Columbia University's School of International and Public Affairs.