

# The NGO Finance, Accounts and Auditors' Workshop

## The Annual Convention

Financial Management | Accounting | Technology | Fundraising

**Venue:** Fairway Hotel, Kampala (Uganda)

**Date:** 8<sup>th</sup> – 9<sup>th</sup> September, 2025

**Theme:** "Building efficient and accountable NGOs"



### A. The NGO Finance, Accounts and Auditors' Forum

#### Join the "The NGO Finance, Accounts and Auditors' Forum"

The demands, knowledge, skills, software, packages and the attitude required to work for a donor funded project or an NGO as the Finance, Accountant, Auditor or Compliance officer is totally different from other sectors. Even when one has all the basic qualifications, this particular sector has its own financial dynamics ranging from the acronyms, tools and systems to soft-wares, packages and IT needs among others.

To a general accountant operating in a Private production company, the term "Cost principles" simply imply **"the items to be recorded as the actual price paid.** Yet for a similar Accountant in the NGO sector, the same term is commonly used to imply **the 4 tests that are used to determine the ALLOWABILITY of any cost;** Reasonableness/

Necessity, Allocability, Conformance to what is generally and locally acceptable and Consistence while applying the cost.

Just by the above example, it only goes to show that practicing finance in the NGO sector is almost “a profession” of its own. Many NGO or development project CEOs and Directors openly admit that they cannot successfully work with a finance person who has no prior experience in the development/ donor world.

*In one of the interviews we conducted, a fully qualified accountant with an envious CPA grade was asked to simply “List some of the key supporting documents for a full-board training” and the answers left everyone bemused! The candidate mentioned; medical forms, National ID among other key documents.*

To make matters worse world over;

- a) The number one challenge most NGOs and development projects face is poor financial management and compliance practices.
- b) Mainly in developing countries, NGOs are often on a collision course with a series of state agencies like Revenue Authorities and national registration bureaus over statutory requirements.
- c) The finance, budget and audit arena from development partners keeps on changing. It's common for one agency to have a pile of donors but each with slightly different requirements – needing more seasoned practioners to tow the thin compliance lines.
- d) The finance field itself is extremely dynamic with piles of new models, practices and tools on market every day. How does a new Finance Manager operate an accounting system they now say is “in the cloud”?
- e) Covid19 and its impact on service delivery and project implementation has challenged every finance office to find better ways of for example paying people you have not met or seen, yet the standard remains, one has to sign.

With these job threatening aspects, there is urgent need for the practioners to regularly associate, learn and share to be able to match the speed of their profession.

### **So what is “The NGO Finance and Budget Managers Forum?”**

This is a peer-driven capacity and learning forum for finance, accounts, compliance, audit and budget managers working with-in the NGO/ CSO sector.

### **Where did this idea come from?**

In mid-2019, a team of Finance, Budget, compliance and audit staff from different local and international NGOs operating in Uganda – who were regularly associating through a peer support group – to offer each other regular professional guidance - decided to share the goal of the group with other colleagues in the same field. This attracted more members who apparently indicated to also have similar capacity gaps. Since then, the group has grown from 27 to 200 members working with over 180 NGOs and Donor

funded projects operating as independent CSO units or with the private or public/ government entities. The members, on a regular basis - engage in training, learning, discovery, reflection and sharing of experiences and tools with and among each other. To them, finance, audit, compliance and award management among NGOs and donor world, has become a specialized profession with much of the capacity shared among each other never solidly available in any formal or academic class of accounting.

### **Why “The NGO Finance and Budget Managers Forum?”**

*The NGO Finance and Budget Managers Forum is a safe space for everyone involved with finance in the NGO and development Projects sector to share, discover, learn and improve. It's also further recognized as a one-stop-shop for development partners to engage the NGO community in questions around budgeting, financing, audit and compliance*

### **Who are the Target Members?**

Anyone in the NGO sector or working with a development agency or Project. Some of these are drawn from Foundations, NGOs, Trusts, Academia, Country Governments, Government entities. Faith based organizations, Charities and NGO regulatory bodies. These specifically involve;

- a) Accounting and finance professionals
- b) Finance managers
- c) Program/ Project accountants
- d) Finance Directors
- e) Grants officers and managers
- f) Senior Operations staff
- g) Auditors
- h) Compliance Officers
- i) Project Managers and Coordinators
- j) Non-finance professionals with interest in Not-for-profit organizations
- k) Finance/ auditing Consultants serving not-for-profit entities

### **How to become a member**

If one is among the above target categories of people, fills an online form. Contact [smallcsosuganda@gmail.com](mailto:smallcsosuganda@gmail.com) Tel or whatsapp +256 756 049 726

### **Benefits for Members**

1. Immediate and just-in time professional peer consultations
2. Capacity building opportunities and forums
3. Professional references and opportunities

### **The current members of “The NGO Finance and Budget Managers Forum?”**

The NGO Finance and Budget Managers Forum (NFABF); Steering Committee is made up of one permanent member who is changed every after five (05) years. This is then joined by five NGO members who are elected on a 2 yearly basis. The portfolio for the permanent member is currently chaired by LINK Partners International and depending on the need. These members meet quarterly to set the strategic direction for the initiative.

### **The available membership forums**

- a) Members use social media for regular professional interaction as peers
- b) There is a quarterly virtual meeting for all members to meet and discuss
- c) There is an Annual Convention that brings together all the members as well as other partners and fans that subscribe to the initiative.

## **B. The NGO Finance and Budget Managers Forum Convention**

### **When is the 2025 Finance and Budget Managers Forum Convention?**

The year 2025 Convention is scheduled from September 8<sup>th</sup> – 9<sup>th</sup>, 2025 at Fairway Hotel, Kampala – Uganda.

### **The Year 2025 Annual Convention Themes**

The year 2025 Annual Convection is comprised of topics selected by the peers to cover the most pressing issues in the industry, featuring general and breakout sessions focusing on the latest topics. This diverse lineup allows for you to create your own schedule and focus on the sessions that support your professional development and institution. Over 500 senior staffs from regional and international NGOs and CSOs will be in attendance. The key areas will hinge on;

- a) Key Financial Management and Accounting for NGOs
- b) Key Fundraising and Sustainability Strategies;
- c) Mandatory Governance and Compliance issues;
- d) New Technology and Innovations for NGOs in Finance

### **The year 2025 Annual Convention Objectives**

1. Offering updates on new accounting, audit and compliance tools, methods and strategies
2. A platform to share and learn good finance and accounting practices and success stories among NGOs/ CSOs
3. Learn about new updates, developments and technologies concerning the finance and budget issues for NGOs

4. For stakeholders involved with NGO and CSOs statutory issues (Revenue Authority, Registrations Service Bureau, Donors, Audit and Compliance firms) to engage and offer more detailed information
5. To get refresher skills and knowledge for finance and professionals as well as administrators in financial management

### How to participate in our Annual Convention

This is the biggest National NGO Finance and Budget Managers Convention in the Region. Members with partners meet to reflect on new developments in their field, do an appreciation of the work and professional related guidelines, understand tools and systems, share working approaches and methodologies, learn of good practices and success stories as well as challenges and platforms or opportunities for growth. The one for 2025 is scheduled in from September 8<sup>th</sup> – 9<sup>th</sup>, 2025 at Fairway Hotel, Kampala – Uganda.

### Explaining the Convention themes in details

#### Theme No. 1: Key Financial Management and Accounting for NGOs

In general, the focus is on practice-oriented approach to NGO accounting and finance. For the professionals, it provides the necessary knowledge and skills for them to cope with those tasks that finance, accountants and budget managers of modern NGOs have to face.

- a) **Principles, standards, forms and tools:** in financial management for NGOs
- b) **Accounting:** Discussing accounting principles, systems, designs, structures and chart of accounts for externally funded CSOs
- c) **Managing external funds:** Common donor principles, challenges and new ways of managing multiple donor funds and budgets
- d) **Budgeting, Monitoring and Reporting:** The financial planning stages and how to sort NGO expenses
- e) **Audits:** Types, nature and tips to effective internal and external NGO auditing
- f) **Statutory Payments and Taxes:** handling mandatory state payments and requirements
- g) **Administrative issues:** Dealing with staff management issues, salaries and compensations
- h) **Controls:** Models of physical, cash and asset controls for NGOs

#### Theme No. 2: Key Fundraising and Sustainability Strategies;

World over, there is a growing shift from reliance solely on donor funding to other internal income sources to sustain NGOs. The main question is; how do Non Profit Organizations (NPOs) adapt to this shift while retaining their core objective? This shift

demands for a reshaping the role of the board to promote sustainable development programs and outcomes that portend increased business opportunities;

- a) **NGOs; Income generating but not profit making:** contributions, membership dues, donations, fund raising, loans, income generating activities, etc.
- b) **Sustainability:** Strategies to keep NGOs financially afloat amidst Covid19 and declining donor funding
- c) **Fundraising/resource mobilization:** Managing internal, business and external funding sources for an NGO
- d) **CSOs and politics:** Navigating the dynamics in a politically charged environment

### **Theme No. 3: Mandatory Governance and Compliance issues;**

NGOs in Uganda have been faced with questions such as; which specific standards do they apply in their reporting? How do they marry their near-cash reporting to the accrual-based accounting called upon by government? How will the donor reports be aligned to the Financial Agencies compliant financial statements? What interest does the tax authority (URA) have in NGOs? Strength in Numbers – How do NGOs collaborate for better outcomes as opposed to “competing for declining/focused donor funding”? This session will focus on creating NGOs that are capable of negotiating with donors on development outcomes as opposed to “micro-organizations that are only seeking funding opportunities”.

- a) Regulatory Space – Taxation, Money Laundering and compliance Issues
- b) Guidelines and Tips for staying compliant with the government/ statutory requirements.
- c) The National Revenue Authorities and the NGO industry.
- d) Best practices to preventing, detecting and deterring fraud among NGOs
- e) Dealing and managing the issue of the Board of Directors/ Trustees in the NGO sector.
- f) The National Registrations Boards and the NGO Sector
- g) The Value-for-Money policies for NGOs/ CSOs
- h) Establishing standard operating procedures for the efficient operations of an NGO in a resource limited setting

### **Theme No.4: New Technology and Innovations for NGOs in Finance**

- a) The need to use IT to manage information, communicate with partner/ stakeholders, perform accounting, and handle various issues on the NGO sector
- b) Bio-metrics and mobile money payments. Its use, authenticity and validity in payments to beneficiaries
- c) Financial Reporting Standards for NGOs; Linkages and Possible Diversions

### **The target Delegates**



Anyone in any sector but managing or handling the finances or resources of an externally funded project is a direct beneficiary of this Convention. The more specific target audience are NGO leaders and Finance teams with responsibility for financial management of their organizations. The audience is drawn from Foundations, NGOs, Trusts, Academia, Country Governments, Government entities. Faith based organizations, Charities and NGO regulatory bodies.

These specifically involve;

- a) Accounting and finance professionals
- b) Finance managers
- c) Program/ Project accountants
- d) Finance Directors
- e) Grants officers and managers
- f) Senior Operations staff
- g) Auditors
- h) Compliance Officers
- i) Project Managers and Coordinators
- j) Non-finance professionals with interest in Not-for-profit organizations
- k) Finance/ auditing Consultants serving not-for-profit entities

## **Participation details**

1. **Attendance;** Participation is by registration
2. **Modes of Participation;** There will be one (02) modes for participation (i) Physical personal attendance (ii) Online/ face-book or Zoom options

## **Why should I sponsor?**

### **How different Private/ corporate companies will benefit?**

NGOs and CSOs rank highest among units requiring and committing service providers with the most need for services, products and packages from the private sector. NGOs and their community need; Insurance, communication and telecom services, internet, banks and loans, stationary, security and guard services, bus/ track purchase and car (hire services). NGOs like Red Cross, Action Aid and World Vision involved rescue and crisis management conduct a lot of work in construction and real estate repair, foods and beverages (including porridge, milk, beans, rice and others), fire gadgets, courier services, cleaning, consultancy and teacher training, funeral service providers, interior designing and decoration, farming companies, event management, garages, assorted office furniture and fittings, corporate management and legal services, Uniforms and Sports, Solar and energy/ cooking services, fuel and petroleum, electronics, Medical

services, water and tanks, pharmacies, CCTV camera suppliers, design and printing, metal and fabrics among others.

### **The interest from the Media**

The media including paper, TV and Radio are looking to attract NGOs and CSOs many of which consume their services through adverts, features, coverage among others.

- 1) CSOs or NGOs in Uganda, beyond government, hold the biggest budgets and employ more than 8 million middle income Ugandans and this provides an opportunity to do business with them.
- 2) Finance and Budget staff control the NGOs budgets as well as manage procurement processes and hence they are the business persons on the companies
- 3) Uganda has more than 30,000 registered NGOs and this will attract the direct interest of many of these

### **Who will host the Program?**

The Year 2022 Convention will be hosted by a number of key partners in the NGO and development world sectors. There will be a host Institution and several lead sponsors.

### **Do members/ Participants pay to attend this Convention?**

Participants will purchase a conference package worth 50,000UGX and will also meet their transport costs. Additional funds will be raised among partners for meals and conference venue.

### **Additional benefits associated with the membership to program through the host;**

1. The participants involved will be offered a certificate by Makerere University.
2. Each of the member schools will be bound to the program by a small membership fee of 50,000/= as a one-time registration fee.
3. The program possess additional services as benefits to the participating schools like national and international teacher and student exchange programs, memberships to academic and social clubs.
4. The program will attract donors, sponsors and capital agencies that fund scholarships, bursaries as well as education and academic programs.
5. Member schools will benefit from advisory and free capacity building and fundraising programs.

### **Government Agencies;**

Beyond the NGOs, several government agencies are extremely interested. These include NSSF, URSB, URA, Financial Intelligence Authority (FIA) and others who by nature of their mandate, are interested in NGO finance operations.

### **Our Contacts**



## **The NGO Finance and Budget Managers Forum**

The 2025 National Convention

P.O Box 31006 Kampala (Uganda) |

Plot 724/5 Millennium House, Nsambya Road Kampala (Uganda)

**E-mail:** [smallcsosuganda@gmail.com](mailto:smallcsosuganda@gmail.com) **Tel or whatsapp +256 756 049 726**

**Website:** <http://consortiumforgrassroots.org/>