

1-2013

PSCI 467.80: Advance Nonprofit Administration - Honors

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Recommended Citation

Albrecht, Fran M., "PSCI 467.80: Advance Nonprofit Administration - Honors" (2013). *Syllabi*. 824.
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PSC 467: Advance Nonprofit Administration
Syllabus: Spring 2013
The University of Montana, Missoula



Location: Davidson Honors College, Room 119
Time: Mondays, 3:10 p.m. – 5:30 p.m.
Instructor: Fran M. Albrecht, M.Ed.
Email: fran.albrecht@mso.umt.edu
Phone: (406) 239-4582
Office Hours: 5:30-6:00 after class in DHC, or by appointment

Course Description

Political Science 467, Advanced Nonprofit Administration, is a core course in the Nonprofit Student Leadership Alliance certification program and undergraduate Minor in Nonprofit Administration at The University of Montana.

The focus of Advanced Nonprofit Administration is to take an in-depth look at four areas central to effective non-profit administration: strategic planning, fund development, grantwriting, and financial management. Specific objectives of the four modules are as follows:

Strategic Planning Module Objectives

- Develop an understanding of the relevance and importance of strategic planning to nonprofit organizations;
- Define, analyze, and discuss the key concepts required to apply an integrated approach to strategic planning;

- Refine and extend analytical skills and technical vocabulary pertinent to the functions of strategic planning and management;
- Analyze stakeholder feedback in advance of strategic planning; and
- Develop a strategic plan.

Grantwriting Module Objectives

- Understand the types of grant-making organizations and foundations;
- Match an idea with potential funding sources;
- Become familiar with fundamental concepts in developing, researching and writing grants;
- Write a grant; and
- Learn how to produce and submit grants.

Fund Development Module Objectives

- Become familiar with current best practices for fund development, including ethical, legislative, and legal considerations related to fundraising;
- Understand the donor pyramid and how to cultivate donors;
- Discuss methodology, best practices, and mistakes in “making an ask”;
- Make a presentation to cultivate and engage audience in the mission of a nonprofit organization
- Write a comprehensive fund development plan for a nonprofit organization; and
- Write an appeal letter

Financial Management Module Objectives

- Identify basic terms and concepts associated with nonprofit financial and managerial accounting;
- Create and become comfortable with basic nonprofit financial statements, their functions and uses;
- Identify the role and function of generally accepted accounting principles which affect nonprofits (GAAPs); and
- Recognize the distinctive roles and expectations of budgets in nonprofit governance and identify different types of nonprofit budgets.

Reading and Materials / Class Participation

Assigned readings will be posted to Moodle. Other readings may be assigned throughout the course.

Please plan to participate in weekly class discussions, projects, and activities. The course takes the approach of a “learning community.” I will periodically arrange for guest speakers in areas of expertise related to course content. Having common information about specific nonprofit administration concepts through weekly reading assignments will give us a base from which to rise to a higher level of understanding through discussion, peer review, and application of course content to real world examples. Sharing your insights, assumptions and thinking about what you have read (as well as actively listening to others) will help to create a rewarding learning environment for all. Respect for others is expected; please do not engage in discussion with other classmates while another student, the instructor, or guest speaker is speaking.

Students are graded on class participation and attendance (see below). Please notify the instructor in advance of anticipated absences, late arrivals or early departures.

Grading

Grading will be based on a cumulative point total of **500 points for undergraduate students** and **600 points for graduate students**, allocated as follows:

- **Participation, Discussion, and Attendance – 90 points**

Each student will be granted one *free* absence, if necessary. All other absences will result in a deduction of five points from the class participation grade. Tardiness and departing class early will factor in the class participation grade. There are 15 classes including the exam.

- Attendance – 5 points per class (75 points)
- Participation – 1 point per class (15 points)

- **Readings – 60 points**

- 10 points possible per discussion board response

- **Strategic Planning Module – 50 points**

- Strategic plan group project (50 points)

- **Grantwriting Template – 100 points/150 points graduate student**

- Grant template (75 points)
- Graduate Students: Extended grantwriting template (50 points)
- Foundation research – locate 5 funding sources for your designated nonprofit (25 points)

- **Fund Development Module – 100 points/150 points graduate student**

- Fund development plan (50 points)
- 3-5 minute presentation (25 points)
- Sponsorship or direct mail appeal (25 points)
- Graduate students: 5-10 minute presentation with audio-visual (50 points)

- **Financial Management Exam – 100 points**

- Total Graduate Student additional requirement – 100 points

All assignments are described in individual assignment sheets posted on Moodle.

Electronic Submission

Assignments are to be submitted electronically to fran.albrecht@mso.umt.edu.

UM Academic Policies & Procedures

All students must practice academic honesty. Academic misconduct is subject to an academic penalty by the course instructor and/or a disciplinary sanction by The University. All students need to be familiar with the Student Conduct Code which is available for your review at <http://life.umt.edu/vpsa/documents/StudentConductCode1.pdf>

Other academic policies may be found at <http://www.umt.edu/catalog/acad/acadpolicy/default.html>

Plagiarism Warning

Plagiarism is the representing of another's work as one's own. It is a particularly intolerable offense in the academic community and is strictly forbidden. Students who plagiarize may fail the course and may be remanded to Academic Court for possible suspension or expulsion. (See Student Conduct Code section of the student catalog.)

Students must always be very careful to acknowledge any kind of borrowing that is included in their work. This means borrowed wording and ideas. Acknowledgment of whatever is not one's own original work is the proper and honest use of sources. In this class, you must use quotes for any group of five or more words taken from another source. For borrowed ideas, you must provide a source after every sentence, or, if the whole paragraph holds an idea from another source, you must provide a source at the end of the paragraph.

Asking another person to edit the structure or mechanics of a work product is acceptable. Allowing another person to significantly revise, using their own words and ideas, your work product is not acceptable.

Students with Disabilities

The University of Montana assures equal access to instruction through collaboration between students with disabilities, instructors, and Disability Services for Students (DSS). I will work with you and DSS to provide an appropriate accommodation if you have a disability that may adversely affect your academic performance. If you think you may have a disability that could adversely affect your academic performance, and you have not already registered with DSS, please contact DSS in Lommasson 154.

ADVANCED NONPROFIT ADMINISTRATION

JAN 31 INTRODUCTIONS AND SETTING THE STAGE FOR STRATEGIC PLANNING

CLASS ACTIVITIES

- Introductions
- Course overview
- Strategic planning overview
- Importance of stakeholder feedback
- Selection of a nonprofit to reference for the semester

FEB 7 STRATEGIC PLANNING: Stakeholder Analysis and Larger Vision

READING

- *The Sustainable Nonprofit: 5 steps to Strategic Planning*
- Stakeholder Assignment

CLASS ACTIVITIES

- Overview strategic planning
- Discuss Stakeholders
- Explore big vision

FEB. 14 STRATEGIC PLANNING: Strategic priorities and measurable targets

READING

- *Burt Nanus and Stephen M. Dobbs*, *Introduction to Strategic Planning*
- *John M. Bryson*, *Strategic Planning for Public and Nonprofit Organizations - Stakeholders*

CLASS ACTIVITIES

- Determine long-term vision for organization
 - Overview on importance of strategic priorities
 - Develop potential strategic priorities
- Guest speaker and exercise

FEB. 21 STRATEGIC PLANNING: Values, mission, vision

READING

- *Michael Allison & Jude Kaye*, *Strategic Planning for Nonprofit Organizations*, Chapter 6
- *Allison & Kaye*, *Strategic Planning for Nonprofit Organizations*, Chapter 8

CLASS ACTIVITIES

- Discuss values and mission
- Guest Speaker/ Class Exercise: Virginia "Ginny" Tribe, Consultant in Strategic Planning, Community Facilitation

FEB. 28 GRANTWRITING: Grant research

READING

-*Cynthia Knowles*, *The First-Time Grantwriter's Guide to Success*, Chapter 1

CLASS ACTIVITIES

- Foundation Online Directory Workshop at the University of Montana Mansfield Library
- Online foundation research

Assignment: Research and find 5 foundations that would be potentially viable funding sources for a nonprofit. You will write a grant template for a nonprofit. If you are working with a nonprofit, you may write a grant for that nonprofit. Whether they submit it or not is their choice. If you are not working with a nonprofit, you will need to find a nonprofit that is willing to have you research and write a grant for them.

MARCH 7 GRANTWRITING: Customizing grant templates

Assignment Due: Strategic Plan

READING

The Community Toolbox: Writing a Grant

http://ctb.ku.edu/en/tablecontents/sub_section_main_1301.aspx

Applying for Funding from Family Foundations

<http://www2.guidestar.org/rxa/news/articles/2009/applying-for-funding-from-family-foundations.aspx?source=aug09nwsltr>

Grantwriting Basics

<http://www.generalcode.com/resources/grant-writing>

Tips from Successful Grantwriters

<http://www.guidestar.org/rxa/news/articles/2006/grant-writing-102-tips-from-successful-grantwriters.aspx>

- Foundation Center, *What should be included in my letter of inquiry?* <http://www.grantspace.org/Tools/Knowledge-Base/Funding-Research/Proposal-Writing/Letters-of-inquiry>

CLASS ACTIVITIES

Guest Speaker: Mike Halligan, Executive Director, Dennis and Phyllis Washington Foundation

Needs statement, goals and objectives, project timeline, key personnel, budget, evaluation

- Overview of customizing the template to the specific needs of grantors
- Cover letters and LOIs

MARCH 14 GRANTWRITING: Pulling it all together

READING

- Rachel Swierzewski, *Rural Philanthropy Building Dialogue From Within* <http://www.mtu.edu/research/administration/sponsored-programs/enhancement/pdf/rural-philanthropy.pdf>
- Bring a draft of your grant to class today

CLASS ACTIVITIES

- Peer review of draft

MARCH 21 FUND DEVELOPMENT: Donors

READING

- *Kim Klein*, Fundraising for Social Change, Chapter 4
- Association of Fundraising Professionals, *Engaging Young Donors*
- Brian Sagrestano and Robert Wahlers, *Making the Case Using Donor-Centered Philanthropic Planning*
- Tom Ahern, *Making Your Case* (Powerpoint)
- Fund Development Assignment

CLASS ACTIVITIES

- Overview of donors and donor pyramid
- Small group review of an organization's case for support
- Principles of how to successfully ask for money
- 3-5 minute undergraduate and 7-10 minute graduate student presentations

Assignment Due: Foundation Research and Grant Template

MARCH 28 FUND DEVELOPMENT: Fund Development Vehicles

READING

- o *Kim Klein*, Fundraising for Social Change, Chapter 3
- o Harold Melsner, *Improve the Success of Endowment Building*
- o Wells Fargo Advisors, *Charitable Giving Techniques*

CLASS ACTIVITIES

- o Overview of donor-based fundraising vehicles:
 - charitable annuities/trusts
 - capital campaigns
 - endowment campaigns
 - planned giving

READING

- Convio, *Using the Internet to Raise Funds and Build Donor Relationships*
- Event360, *Four Tips to Turn Your Awareness Event into a Fundraising Event*
- Willis Turner, *Direct Response Fundraising*
- Network for Good, *The Big Event: 5 Tips For Making Your Next Fundraising Event a Great Success*
- Letter Assignment: Write an annual appeal letter for a nonprofit

CLASS ACTIVITIES

- Overview of fundraising vehicles: online, events, direct mail, raffle, house parties, tours, social media
- 3-5 minute undergraduate and 7-10 minute graduate student presentations

APRIL 4 SPRING BREAK (No class)

APRIL 11 FUND DEVELOPMENT: Fund development plan

Appeal Letter Assignment Due

READING

- Paul Lagasse, *Measure for Measure*
- Barbara Cicone and Jeanne Jacob, *Fundraising Basics*, Chapter 5

CLASS ACTIVITIES

- Correlation of fund development plan with mission, vision, strategic priorities, budget, marketing
 - Overview of fund development plan components
- Guest Speaker Panel: Nonprofit Development Personnel

APRIL 18 FINANCIAL MANAGEMENT: Overview, key financial terms, and budgeting

READING

- Jeanne Bell & Elizabeth Shaffer*, *Financial Leadership for Nonprofit Executives*, Chapters 1 and 4 and pp. 113-119

CLASS ACTIVITIES

- Terminology
- Financial statements overview
- Draft budget

Assignments Due: Fund Development Plan

APRIL 25 SPECIAL CLASS OFF-SITE: St. Patrick Health and Sciences Center
Broadway Building, 500 West Broadway Lawrence White Board Room, 1st floor (park in parking garage)

Guest Speaker: Jeff Fee, CEO, St. Patrick Hospital – Making Change Happen, a slow yet significant process

MAY 2 FINANCIAL MANAGEMENT: Financial planning, audits, and the Form 990

READING

- Jeanne Bell & Elizabeth Shaffer*, *Financial Leadership for Nonprofit Executives*, Chapter 5
- *Advancing Philanthropy, Nonprofit Finance*
- Blue Avocado, *Five Internal Controls for the Very Small Nonprofit*

CLASS ACTIVITIES

- Create financial statements
- Guest panel: audits and Form 990

MAY 9 FINANCIAL MANAGEMENT: Putting it all together

READING

- Blue Avocado, *Nonprofit Bookkeeping Test*

CLASS ACTIVITIES

- Class evaluation
- Prepare for financial management exam
- Questions?

MAY 14, 1:10-3:10 FINANCIAL MODULE EXAM

Exam will be constructed as a one-hour exam and will cover materials and instruction covered in the Financial Module of the class. Students must pass this exam (70 or better) in order to receive credit for the class. If a student must retake the exam, scores will be averaged until passage occurs.