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PSC 467.01: Advance Nonprofit Administration

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PSC 467: Advance Nonprofit Administration
Syllabus: Spring 2009
University of Montana, Missoula



Location: Davidson Honors College, Room 119
Time: Mondays, 4:10 p.m. – 6:30 p.m.
Instructor: Chris Newbold, JD, CFRE, CSPG
Office: University of Montana, Davidson Honors College 015
Email: chris.newbold@mso.umt.edu (UM Address) or cnewbold@alpsnet.com (Work Address)
Phone: (406) 728-3113
Office Hours: Due to Adjunct Status, by Appointment Only

Course Description

Political Science 467, Advanced Nonprofit Administration, is a core course in the American Humanities (AH) 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, fundraising, financial management and grant-writing. Specific objectives of the four areas are as follows:

Strategic Planning Module Objectives:

- Develop an understanding of the relevance and importance of strategic planning and management to nonprofit organizations;

- Define, analyze and discuss the key concepts required to apply an integrated approach to strategic planning;
- Refine and extend the student's analytical skills and technical vocabulary pertinent to the functions of strategic planning and management; and
- Challenge, stimulate and guide rigorous discussion of the potential and limitations of applying strategic planning and management concepts to nonprofit organizational settings.

Fundraising Module Objectives:

- Become familiar with current best practices for fundraising, including ethical, legislative and legal considerations;
- Incorporate “lessons learned” and counsel from guest speakers into your fundraising repertoire;
- Learn how to write a fundraising / development plan for a non-profit organization;
- Learn how to ask for money;
- Understand the donor pyramid and how to cultivate donors;
- Create a comprehensive donor-focused fundraising strategy using a variety of fundraising tools and techniques; and
- Understand the points of intersection and divergence between fundraising, branding, marketing, communications and advocacy.

Financial Management Module Objectives:

- Identify basic terms and concepts associated with nonprofit financial and managerial accounting;
- Identify basic nonprofit financial statements, their functions and uses;
- Identify the role and function of generally accepted accounting principals which affect nonprofits (GAAPs);
- Recognize the distinctive roles and expectations of budgets in nonprofit governance and identify different types of nonprofit budgets; and
- Recognize IRS forms required to be filed by nonprofits.

Grant-Writing Module Objectives:

- Understand differences between various grant-making organizations, and different types of foundations;
- Understand how to match an idea with a potential funding source;
- Become familiar with fundamental concepts in developing and writing grants;
- Learn how to produce and submit grants; and
- Learn how to follow up after grants have been submitted, including activities whether grants are funded or not.

Required Reading and Materials

The required reading for PSC 467 is greater than in PSC 466 given the depth of the topics we will explore. Please recognize this fact and prepare accordingly in your weekly preparation for class. Plan ahead, look at the reading load and spread it out over the course of a week in preparation for the next class. Given the fact this is a 3-credit class which only has an opportunity to meet once a week, it is not unusual to have 100+ pages of reading per week.

Please plan to participate in weekly class discussions, projects and activities. The course takes the approach of a “learning community.” 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.

The course textbooks, available at the UC Bookstore, are as follows:

- Michael Allison & Jude Kaye, *Strategic Planning for Nonprofit Organizations* (John Wiley & Sons, 2nd ed.)
- Kim Klein, *Fundraising for Social Change* (Chardon Press, 5th ed.)
- Cynthia Knowles, *The First-Time Grantwriters Guide to Success* (Corwin Press, 1st ed.)
- Jeanne Bell Peters and Elizabeth Schaffer, *Financial Leadership for Nonprofit Executives* (CompassPoint Nonprofit Services and Fieldstone Alliance, Second Printing, January 2006).

Reading assignments are posted in the course schedule. Additional material may be announced on a weekly basis and either provided to you in class or electronically. PSC 467 will use Blackboard for any electronic postings.

Requirements

Following the first class period, each student will be expected to adopt a non-profit organization of interest to the student. A variety of class exercises and class assignments will revolve around the non-profit you adopt. Make sure the organization carries a mission and passion for you personally. The non-profit organization you select can be an:

- An actual organization you have worked with in the past;
- An actual organization you aspire to work with that carries a personal passion for you;
- An actual organization you have researched on the Internet and is of interest to you;
- A fictional organization you have thought about starting and would like to begin planning for.

Students should be prepared to identify the organization at the beginning of the second class of the semester. Your adopted organization will be incorporated into each of the strategic planning, fundraising and grant-writing modules.

No Service Learning Agreement requirement exists in PSC 467. The graduate student requirement will take the form of a 20-minute class presentation on a subject TBD.

Grading

Grading will be based on a cumulative point total of 500 points, based on the following allocations:

- Strategic Planning Module – 100 points (20%)
 - a. Small group work product (30 points);
 - b. 5 page paper in response to strategic planning fact pattern (70 points)
- Fundraising Module – 125 points (20%)
 - a. Creation of a development plan for your non-profit (70 points)
 - b. Two-page direct mail appeal (35 points)
 - c. 2 Quizzes (10 points each)
- Grant-Writing Module – 100 points (20%)

All students will identify, research and prepare a grant application to advance the mission of the non-profit they have adopted. Details will be announced at the time of the module (100 points)

- Financial Management Exam – 100 points (20%)

A 100 point exam will be given on the financial management section. **NOTE: You must pass this exam (70 or better) in order to receive credit for the class! If you are required to retake the exam, your scores will be averaged until passage occurs.**

- Attendance and Individual Class Assignments – 75 points (15%)

Class attendance is critically important given the fact we only meet 15 times over the course of the semester. Unexcused absences will affect your grade. Students will also participate in peer review exercises, individual class assignments and other homework from time to time.

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. The course instructor reserves the right to alter items reflected on this syllabus as deemed necessary to achieve course objectives.

ADVANCED NONPROFIT ADMINISTRATION

JAN. 26 **INTRODUCTIONS AND STRATEGIC PLANNING – PART I** *Week 1*

CLASS ACTIVITIES

- Course overview and introductions
- American Humanics certification program & UM Minor in Nonprofit Administration
- Introduction to Strategic Planning
- Goal Setting Snippets
- Small Groups for the Strategic Planning Module

FEB. 2 **STRATEGIC PLANNING – PART 2** *Week 2*

READING

- *Allison & Kaye*, Chapter 1. Introduction to Strategic Planning
- *Allison & Kaye*, Chapter 2. Phase I: Get Ready
- *Allison & Kaye*, Chapter 3. Phase II: Articulate Mission, Vision, and Values
- *Allison & Kaye*, Chapter 4. Phase III: Assess Your Situation

CLASS ACTIVITIES

- Each student should hand in a one-paragraph description of the non-profit organization they've adopted for the semester
- Complete Worksheets 5, 6 & 7 on your adopted non-profit organization
- The Strategic Planning Process: From Start to Finish (with David Ports)
- Small Group discussions / Peer Reviews

FEB. 9 **STRATEGIC PLANNING – PART 3** *Week 3*

READING

- *Allison & Kaye*, Chapter 5. Phase IV: Agree on Priorities
- *Allison & Kaye*, Chapter 6. Phase V: Write the Strategic Plan
- *Allison & Kaye*, Chapter 7. Phase VI: Implement the Strategic Plan
- *Allison & Kaye*, Chapter 8. Phase VII: Evaluate and Monitor the Strategic Plan

CLASS ACTIVITIES

- Brief lecture on strategic planning: Phases IV & V, VI & VII
- Small Group Discussions: Potential stakeholders and SWOT exercise
- Strategic Planning Assignment

FEB. 16 NO CLASS – PRESIDENT’S DAY
Week 4

Assignment Due: Strategic Planning Paper is due on **Wednesday, February 18** by 4:00pm either electronically at chris.newbold@mso.umt.edu or in the Newbold mailbox in the Political Science Department in the Liberal Arts building.

FEB. 23 FUNDRAISING – PART I – Fundraising Framework, Fundraising Development Plans & Asking for Money
Week 5

READING

- *Klein*, pgs. 1-90, 419-428 (Fundraising Development Plans)

CLASS ACTIVITIES

- Basic fundraising principles / The Art of the Ask
- Small group review of an organization’s case for support
- Principles on how to successfully ask for money
- Discussion of Development Plan Assignment

MARCH 2 FUNDRAISING – PART II (Acquiring and Keeping Donors)
Week 6

READING

- *Klein*, pg. 135–239

CLASS ACTIVITIES

- Quiz
- Lecture: Basic Principles of Acquiring and Keeping Donors
- Small group breakouts to review direct mail pieces

Module Guest Panel: *Community Donors / Philanthropists – What motivates them to give?*

MARCH 9 FUNDRAISING – PART III (Special Events, Other Donors)
Week 7

- *Klein*, pgs. 90-134 (Special Events), 471-484 (Special Events)
- *Business’s Social Contract: capturing the Corporate Philanthropy Opportunity*,
<http://www.corporatephilanthropy.org/research/pubs/SocialContract.pdf>

Assignment Due: Direct Mail Appeal is due on **Monday, March 9** either at Class, electronically at chris.newbold@mso.umt.edu or in the Newbold mailbox in the Political Science Department in the Liberal Arts building.

MARCH 16 FUNDRAISING – PART IV (Major Gifts, Capital Campaigns, Planned Giving)

Week 8

READING

- *Klein*, pg. 269-332

CLASS ACTIVITIES

- Quiz
- Lecture: Upgrading Donors and Major Campaigns; Planned Giving
- Graduate Student Group Presentations of Fundraising Development Plans
- TBD

Assignment Due: Fundraising Development Plans are due on Friday, March 20 by 4:00pm either electronically at chris.newbold@mso.umt.edu or in the Newbold mailbox in the Political Science Department in the Liberal Arts building.

MARCH 23 GRANT WRITING – PART I (Grant Research)

Week 9

A key aspect of the Grant-writing Module later in the semester is to understand the Foundation world and how to research grant opportunities. In this class, we will participate in a Foundation Online Directory Workshop at the University of Montana Mansfield Library. There, we will learn how to do online foundation research and get vital information important to successful grant-writing. Meet at Mansfield Library in the lobby at the beginning of class to go through the workshop. The workshop will likely conclude by 5:30.

READING

- *Knowles*, Chapter 1 (Where's the Money?)
- An Introduction to Types of Foundations (Mansfield Library) (e-res)
- Preliminary Overview of Grant-writing

MARCH 30 SPRING BREAK (No class)

Week 10

APRIL 6 GRANT-WRITING – PART II

Week 11

READING

- *Knowles*, Chapter 2 – 6; pp. 15 – 58 (Guidelines; Knowing Your Audience; Establishing Need; Goals and Objectives; Plan of Operation)

CLASS ACTIVITIES

- Lecture: Key Principles of Grant-writing
- Module Guest Panel: *Grantseekers and Grantmakers – Keys to Success*
- Peer Review of Grant Application Assignments (TBD)

APRIL 13 GRANT-WRITING – PART III

Week 12

READING

- *Knowles*, Chapter 7 – 11; pp. 59 – 98 (Key Personnel, Budget Development; Evaluation Plan; Capacity; Miscellaneous Information)

CLASS ACTIVITIES

- Lecture: Key Principles of Grant-writing (continued)
- Peer Review of Grant Application Assignments (TBD)

Assignment Due: Your prepared grant is due on Wednesday, April 22nd by 4:00pm either electronically at chris.newbold@mso.umd.edu or in the Newbold mailbox in the Political Science Department in the Liberal Arts building.

APRIL 20 FINANCIAL MANAGEMENT – PART I (Understanding Financial Data, Assessing Your Organization's Financial Health, Key Financial Terms)

Week 13

READING

- *Peters & Shaffer*, pgs. 1-63, 113-119 (Key Financial Terms)

CLASS ACTIVITIES

- Lecture
- Small Group Discussions / Practical Applications

GUEST LECTURER: Sara D. Smith, CPA

APRIL 27 FINANCIAL MANAGEMENT – PART II (Financial Planning, Budgeting & the IRS Form 990)

Week 14

READING

- *Peters & Shaffer*, pgs. 64- 111 1-63, 113-119

CLASS ACTIVITIES

- Lecture
- Small Group Discussions / Practical Applications

MAY 4 FINANCIAL MANAGEMENT – PART III (Last Class Period)
Week 15

READING

- None; Focus on Exam Financial Management Exam Preparation

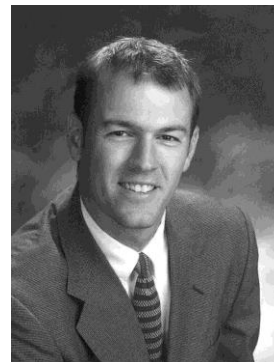
CLASS ACTIVITIES

- Class Evaluation
- Financial Management Exam

THERE IS NO FINAL EXAM IN PSC 467.

Course Instructor Biography:

CHRIS L. NEWBOLD is President and Principal Consultant of ALPS Foundation Services, a non-profit fundraising and philanthropic management consulting firm based in Missoula, Montana, and part of the ALPS Family of Professional Service Companies. Chris has dedicated his consulting practice to the advancement of non-profit organizations, with services ranging from capital campaign management to annual giving, board development to strategic planning. He has worked with many of Western Montana's leading non-profits, and with non-profits of all shapes and sizes across the United States.



Chris is an attorney and currently holds designations as a Certified Fundraising Executive (CFRE) and Certified Specialist in Planned Giving (CFRE). He has developed a special niche in the consulting field in working with law-related charities. In that capacity, he has presented on numerous occasions before the National Conference of Bar Foundations (NCBF), the National Association of Bar Executives and other state & regional bar leader gatherings. Chris is also the author of the authoritative resource manual on bar foundations, entitled *The Complete Guide to Bar Foundations*, published in 2006.

Before joining ALPS Foundation Services, Chris served as a law clerk for the Hon. Terry N. Trieweiler of the Montana Supreme Court. He earned his Bachelor of Arts degree from the University of Wisconsin-Madison in 1993 and his Juris Doctorate degree from the University of Montana School of Law in 2001. Prior to earning his law degree, Mr. Newbold focused his career in the non-profit sector, serving five years as executive director of the Montana Public Interest Research Group (MontPIRG), a statewide environmental, consumer and good government organization.

Chris is currently a member of the State Bar of Montana, the American Bar Association, the Association Foundation Group, the Association of Fundraising Professionals and the Western Montana Fundraisers Association. He also serves as President of Big Brother Big Sisters of Missoula and the Montana Public Interest Research Foundation.

Locally, Chris has worked in various capacities with the following Western Montana-based non-profit organizations:

- Camp Mak-a-Dream
- Community Medical Center Foundation
- Watson Children's Shelter
- Missoula Art Museum
- Big Brothers Big Sisters of Missoula
- Missoula Community Access Television (MCAT) and
- United Way of Missoula