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PSC 467.01: Advance Nonprofit Administration

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PSC 467: Advance Nonprofit Administration
Syllabus: Spring 2008
University of Montana, Missoula



Location: Davidson Honors College, Room 119
Time: Thursdays, 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 (preferred contact)
Phone: (406) 523-3885

Office Hours: Tuesdays: 4:00 – 5:00 pm, After Class and by Appointment

Course Description

Political Science 467, Advanced Nonprofit Administration, is a core course in the American Humanics (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 significantly 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.)
- Jae K. Shim & Joel Siegal, *Financial Management for Nonprofits* (McGraw-Hill, 1st ed.)

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 placed on electronic reserve. The class e-res password = newbold

Requirements

After 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. Teams of 2 will present either a strategic plan or their fundraising development plan.

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 (50 points);
 - b. 3 page paper in response to strategic planning fact pattern (50 points)
- Fundraising Module – 100 points (20%)
 - a. Creation of a development plan for your non-profit (70 points)
 - b. 2 Quizzes (15 points each)

- 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!**

- 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)

- Attendance and Individual Class Assignments – 100 points (20%)

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.

Syllabus Alternations

The course instructor reserves the right to alter items reflected on this syllabus as deemed necessary to achieve course objectives. In other words, this is a working document (grading is firm).

ADVANCED NONPROFIT ADMINISTRATION

JAN. 24 INTRODUCTION 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
- Identify Small Groups for Strategic Planning Module

JAN. 31 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

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
- Brief lecture on strategic planning: Phases I & II
- Small Group discussions / Peer Reviews

FEB. 7 STRATEGIC PLANNING – PART 3 *Week 3*

READING

- *Allison & Kaye*, Chapter 4. Phase III: Assess Your Situation
- *Allison & Kaye*, Chapter 5. Phase IV: Agree on Priorities
- *Allison & Kaye*, Chapter 6. Phase V: Write the Strategic Plan

CLASS ACTIVITIES

- Brief lecture on strategic planning: Phases III, IV & V
- Small Group Discussions: Potential stakeholders and SWOT exercise
- Class discussion of planning methods to establish goals, direction and high performance
- Module Guest Panel: *Practical Use and Development of a Strategic Plan – Tips and Lessons*

FEB. 14 STRATEGIC PLANNING – PART 4
Week 4

READING

- *Allison & Kaye*, Chapter 7. Phase VI: Implement the Strategic Plan
- *Allison & Kaye*, Chapter 8. Phase VII: Evaluate and Monitor the Strategic Plan

CLASS ACTIVITIES

- Lecture
- Graduate Student Group Presentations of Strategic Plans
- Strategic Planning Assignment Handed Out

FEB. 21 FUNDRAISING – PART I
Week 5

READING

- *Klein*, pg. 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

Assignment Due: Strategic Planning Paper is due on Friday, February 22 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. 28 FUNDRAISING – PART II
Week 6

READING

- *Klein*, pg. 63–239

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 6 FUNDRAISING – PART III
Week 7

READING

- *Klein*, pg. 239-332

CLASS ACTIVITIES

- Quiz
- Lecture: Upgrading Donors and Major Campaigns; Planned Giving
- Graduate Student Group Presentations of Fundraising Development Plans
- Module Guest Panel: *Fundraising for Success, the Non-Profit Leader Perspective – Individual Donors, Major Campaigns, Capital Campaigns, Do's and Don'ts*

MARCH 13 FUNDRAISING – PART IV (Grant Research)
Week 8

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

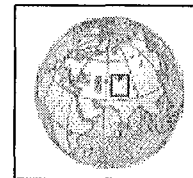
- *Knowles*, Chapter 1 (Where's the Money?)
- An Introduction to Types of Foundations (Mansfield Library) (e-res)
- Selection of Funding Resources (Mansfield Library) (e-res)

Assignment Due: Fundraising Development Plans are due on Tuesday, March 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.

MARCH 20 SPECIAL GUEST LECTURER: Garth Willis
Week 9

Sponsored by the Office of International Programs

Garth Willis is the founder and director of The Alpine Fund, a small, non-profit, non-governmental organization (NGO) using the incredible mountain resources of Kyrgyzstan to help the country's most vulnerable youth. The Alpine Fund offers children and young adults in orphanages, residential facilities and hot lunch programs the chance to escape the confines of their daily surroundings and challenge them in a mountain environment. Through hikes, climbs, education programs and individual mentoring, it seeks to gain the trust of these youth and work with them to



brighten their future. The Alpine Fund is a registered 501(c)(3) in the State of Minnesota and registered as a non-profit organization with the Ministry of Justice of the Kyrgyz Republic.

Mr. Willis will be on the campus of the University of Montana from March 17-21, and has agreed to visit our class to talk about his program and share his experiences running an NGO in a fascinating and changing region of the world.

READING

- Visit www.alpinefund.org and review its contents

MARCH 27 SPRING BREAK (No class)

Week 10

APRIL 3 FINANCIAL MANAGEMENT – PART I (Accounting Basics, Budgets and Cash Flow Projections)

Week 11

READING

- *Shim & Siegal*, Chapters 1, 2, 6 & 12 (Introduction; Nonprofit Financial and Managerial Accounting; Budgeting: A Tool for Planning and Control; & Cost Accounting and Cost Analysis for Pricing)
- Review budget samples and worksheets

CLASS ACTIVITIES

- Lecture
- Small Group Discussions / Practical Applications

GUEST LECTURER: Sara D. Smith, CPA

APRIL 10 FINANCIAL MANAGEMENT – PART II (Controls, Financial Statements and IRS Form 990)

Week 12

READING

- *Shim & Siegal*, Chapters 4 & 13 (Financial Statement Analysis and Avoiding Financial Distress & Analysis for Non-routine Decisions and Financial Modeling for Program Analysis)

CLASS ACTIVITIES

- Review financial controls, statements and how to fill out a Form 990
- Exam Review

GUEST LECTURER: Sara D. Smith, CPA

APRIL 17 FINANCIAL MANAGEMENT EXAM / GRANTWRITING – PART I
Week 13

First Half of Class: Financial Management Exam

READING

- None; Focus on Exam Prep
- Assignment: Print two sets of grant guidelines which might be a match between your organization's mission and the grant-maker's guidelines

CLASS ACTIVITIES

- Preliminary Overview of Grant-writing
- Small Group Review of Grant Guidelines

APRIL 24 GRANT-WRITING – PART II
Week 14

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)

MAY 1 GRANT-WRITING – PART III (Last Class)
Week 15

READING

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

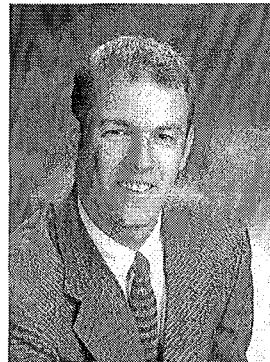
CLASS ACTIVITIES

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

Assignment Due: Your prepared grant is due on Thursday, May 8th 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.

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 Missoula'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 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