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Spring 2-1-2018

### PSCI 467.80: Advanced Nonprofit Administration

Keri A. McWilliams

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**PSC 467: Advanced Nonprofit Administration**  
**Syllabus: Spring 2018**  
The University of Montana

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Location: Davidson Honors College, Room 119  
Time: Thursdays, 3:30 p.m. – 5:50 p.m.  
Instructor: Keri McWilliams, MPA  
Email: [keri.mcwilliams@mso.umt.edu](mailto:keri.mcwilliams@mso.umt.edu)  
Phone: (406) 549-4336  
Office Hours: After class or by appointment

## **Course Description**

Political Science 467, Advanced Nonprofit Administration, is a core course in the 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 nonprofit administration: grant writing, fund development, financial management and strategic planning. Specific objectives of the four modules are as follows:

### **Grant Writing 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;
- Learn how to produce and submit grants; and
- Write a grant.

### **Fund Development Module Objectives**

- Become familiar with current best practices for fund development;
- 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 an audience in the mission of a nonprofit organization;
- Write a comprehensive fund development plan for a nonprofit organization; and
- Write an appeal letter.

### **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 use 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.

## 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

Assigned readings will be posted to Moodle.

## Class Participation

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. Students are encouraged to engage guest speakers in respectful dialogue and meaningful questions. 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.

In addition to assignments, students earn a grade for 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 **600 points for undergraduate students** and **700 points for graduate students**. **All assignments are described in individual assignments posted on Moodle.** Points will be allocated as follows:

- **Participation and Attendance – 100 points**  
Students are expected to attend class, especially given that the class only meets 14 times during the semester. 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 into the attendance grade.
  - Attendance – 5 points per class (70 points)
  - Participation – (30 points)
- **Presentation – 25 points for undergraduate students and 75 points for graduate students**
  - Undergraduate students will give a 5-7 minute presentation on the nonprofit of their choice
  - Graduate students will give a fifteen minute presentation on the nonprofit of their choice using an audio/visual aid

- **Grantwriting Module – 150 points undergraduate students and 200 points graduate students**
  - Foundation research – locate 5 funding sources for your designated nonprofit and complete worksheet provided (25 points)
  - Submission of a first draft of the grant (25 points)
  - Grant application assignment (100 points undergraduates). Graduate Students: Extended grantwriting assignment (150 points)
  
- **Fund Development Module – 125 points**
  - Fund development plan (100 points)
  - Direct Mail Appeal Letter (25 points)
  
- **Strategic Planning Module – 100 points**
  - Write a strategic plan template for an organization of your choice.
  
- **Financial Management Exam – 100 points**

Percentage	Letter Grade
93-100	A
90-92.9	A-
86-89.9	B+
83-85.9	B
80-82.9	B-
76-79.9	C+
73-75.9	C
70-72.9	C-

## **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.

## **PSCI 467 ADVANCED NONPROFIT ADMINISTRATION**

### **JAN. 25 INTRODUCTIONS AND SETTING THE STAGE FOR FOUNDATION RESEARCH AND GRANT WRITING**

#### **CLASS ACTIVITIES:**

- Introductions
- Course overview
- Discussion/Lecture: Introduction to philanthropy; philanthropic giving in the U.S.; types of foundations; identifying foundation prospects; and key facts on foundation giving.

### **FEB. 1 GRANT WRITING: CUSTOMIZING YOUR PROPOSAL**

#### **CLASS ACTIVITIES:**

- Lecture: Writing cover letters and letters of inquiry; goals and objectives, creating timelines; identifying key personnel; budget and budget narratives; and evaluation plans.

### **FEB. 8 FOUNDATION RESEARCH**

#### **CLASS ACTIVITIES:**

- Foundation Center Online Directory Workshop at the University of Montana Mansfield Library
- **CLASS WILL BE HELD AT THE MANSFIELD LIBRARY. Meet at 3:30 in the lobby of the Mansfield Library.** A Mansfield Center librarian will be expecting us and will be leading the training on using the Foundation Center Online. Following her training, you are welcome to use the remaining class time to complete your Foundation Prospect Worksheet assignment.

### **FEB. 15 GRANT WRITING: PULLING IT ALL TOGETHER**

**ASSIGNMENT DUE:** Grant Prospect Worksheet

#### **CLASS ACTIVITIES:**

- Guest Speaker: Representatives from local foundations will provide backgrounds on the various foundations they oversee and will offer advice and tips on submitting successful grant proposals as well as advice on building positive relationships between nonprofit organizations and foundation staff.

### **FEB. 22 FUND DEVELOPMENT OVERVIEW**

**ASSIGNMENT DUE:** First draft of your grant assignment. Upload to Moodle and bring a copy to class

#### **CLASS ACTIVITIES:**

- Peer review of grants
- Lecture/discussion on fund development including writing appeal letters, creating fund development plans, the donor pyramid and creating gift charts.
- Review sample appeal letters and a sample fund development plan

**MAR 1 PLANNED GIVING**

**ASSIGNMENT DUE:** Grant Application

**CLASS ACTIVITIES:**

- Guest Speaker
- Overview of Charitable Gift Annuities, Deferred Charitable Gift Annuities, Charitable Remainder Trusts and Charitable Lead Trusts.
- Discussion/Lecture on bequests and developing legacy circles and declarations of intent.

**MAR 8 CAPITAL CAMPAIGNS**

**CLASS ACTIVITIES:**

- **CLASS WILL BE HELD POTENTIALLY BE HELD OFFSITE TODAY. TBA**

**MAR 15 FUND DEVELOPMENT WRAP-UP AND INTRO TO STRATEGIC PLANNING**

**ASSIGNMENT DUE:** Appeal Letter

**CLASS ACTIVITIES:**

- Class time to address fund development plan questions
- Strategic planning overview
- Importance of stakeholder feedback

**MAR 22 STRATEGIC PLANNING: MISSION, VISION & VALUES**

- Writing mission, vision, and values
- Guest speaker: strategic planning consultant

**MAR 29 SPRING BREAK!**

**APR 5 STRATEGIC PLANNING: THE LARGER VISION**

**ASSIGNMENT DUE:** Fund Development Plan

**CLASS ACTIVITIES:**

- Discussion on strategic priorities and measurable objectives
- Determine long-term vision for organizations

**APRIL 12 FINANCIAL MANAGEMENT OVERVIEW**

**CLASS ACTIVITIES:**

- Overview of key financial terms and budgeting
- Financial planning, audits and the Form 990
- Government funding

**April 19      FINANCIAL MANAGEMENT: FINANCIAL STATEMENTS & ENDOWMENTS**

**CLASS ACTIVITIES:**

- Guest speaker: understanding and reviewing financial statements
- Lecture on endowments

**APRIL 26      FINANCIAL MANAGEMENT: BUDGET GAMES**

**ASSIGNMENT DUE:** Strategic Plan

**CLASS ACTIVITIES:**

- Lecture on budgets and budgeting
- Budget Game Exercise

**MAY 3          FINANCIAL MANAGEMENT WRAP-UP**

**CLASS ACTIVITIES:**

- Practice reading financial statements
- Review for final exam

**MAY 10        FINAL EXAM**

- Time: 3:30 p.m.
- Location: DHC 119