**Course Description**

The nonprofit sector in the United States contains well over a million organizations and is growing rapidly. An estimated 10% of the American workforce is employed in the nonprofit sector, and one in three individuals is a volunteer. Arguably every individual in the world has been served by a nonprofit or nongovernmental organization at one point in his or her life. Only some of you in this course intend to pursue a professional career in nonprofit management, but all of you – whether as business or arts industry managers, public managers, volunteers or citizens – will interact with the nonprofit sector throughout your lifetime.

This survey course will provide you with an overview of nonprofit law and operations. The course begins with the legal structure of the sector, and also covers both general management practices that apply to all public and private organizations (marketing, strategic planning, inter-organizational relations, human resources, ethics and financial management) and practices unique to nonprofits (boards and governance, volunteer management, legal responsibilities, fundraising, etc.). The course uses a combination of readings, lectures, and experiential service-learning to give you opportunities to learn about the nonprofit sector first hand.

Upon successful completion of this course, you can expect to have gained:

- An understanding of the major issues and concerns currently facing nonprofit organizations
- Knowledge of nonprofit management methods and practices
- An understanding of laws and standards applicable to nonprofit organizations
- Direct experience in a nonprofit organization through your service-learning project
- Experience in analyzing management dilemmas and proposing responses
- Improved writing and presentation skills

**Office Hours**

I am usually available after class on Tuesdays and Thursdays as well as at other times during the week. If you have any questions or concerns please make an appointment to meet with me so that I can plan accordingly.

**Campus Mailbox**

SPEA 341

**Secretary**

Jennifer Mitchner/ SPEA 341/ 855-7980

**Email**

mbeer@indiana.edu

You can always contact me by email with questions or concerns. Occasionally I will send out a course announcement via email and the IU policy is that you are expected to check your email regularly. I define regularly as once daily.

**Required Textbooks**

**Understanding Nonprofit Organizations: Governance, Leadership and Management.**

by J. Steven Ott (Editor). 2001

Published by Westview Press

**The Resilient Sector**

by Lester Salamon. 2003

Published by Brookings Institution Press

Additional readings will be posted on OnCourse.

These books are available used or new at Boxcar Books, 408 East Sixth Street, next to the Runcible Spoon. Boxcar is a local nonprofit bookstore. The books are NOT available at campus bookstores. For more information on Boxcar Books visit: www.boxcarbooks.org/textbooks
Summary of Course Requirements

(1) Daily class attendance, completion of all readings and assignments and active participation and contributions to class discussions and activities (10%)

(2) Two unit tests (40%)

(3) Service-Learning Volunteer Hours and Journal Reflections (15%)

(4) Final paper outline and email updates (5%)

(5) Final paper (25%) based on your service-learning project: Participation as an equal partner in a semester-long, team-based volunteer project and completion of a project report based on the service-learning project and applying what you have learned in class to the organization you worked with.

(6) Group presentation on your team’s service-learning project and final paper (5%)

Online Material
We will be reading web-based resources as indicated in the syllabus. All reading will either be posted on the OnCourse “Resources” link under “reading assignments” or the URL will be provided in the syllabus.

Communication
This course requires familiarity with OnCourse, where announcements, reading assignments, syllabus updates, additional resources and grades will be posted: http://onCourse.iu.edu/Default.asp?action=login. I expect you to log onto OnCourse once or twice every week and check your email daily to be sure that you are up to date on all course assignments. You can also use OnCourse to post news articles or other resources that you find that are relevant to this course.

I prefer that you contact me directly at:

mbeer@indiana.edu

I will occasionally need to change assignment deadlines or the class schedule. These changes will be announced in class. If you miss a class, it is your responsibility to obtain these communications from another student.

Late Assignments
All assignments must be submitted at the beginning of class on their due dates, or by the specified time on the syllabus. Assignments that are turned in late (after the time which they are due) are penalized 10% of the grade for each day. I will not accept assignments that are more than four days late, this includes weekends.

Attendance
Your attendance and participation are crucial contributions to everyone’s learning throughout the semester. Education requires you to be engaged and present. Lectures will often go beyond the readings and the in class discussions will be included on exams and will help you better understand the material for your final papers.

Attendance is required and will be taken at the beginning of each class. However, I know that we all get sick or have family emergencies throughout the semester. I hope you take your education seriously and will not miss class for other reasons. If you miss a class you are responsible for getting the notes from another classmate.

If you miss more than three class periods (for ANY reason) you will be penalized one percentage point (10 points) from your final grade for each additional day missed.

Please come to class on time. We have a lot to cover and I will begin at the scheduled class time. If you leave class early or arrive late you may be counted as absent.

There are NO make-up exams. A rare exception will be made for a documented severe illness or family emergency if you inform me before the exam. Prompt documentation is your responsibility.
**Academic Integrity**

You are responsible for informing yourself of and adhering to all of the rules and regulations of this university. See the CODE OF STUDENTS RIGHTS, RESPONSIBILITIES, AND CONDUCT: http://www.iu.edu/~code/code/index.shtml

Cheating in any manner is absolutely prohibited. In all cases (exams, assignments, etc.) you are expected to submit your own original work with proper citation of any material that is not your own. All cases of academic dishonesty will be reported to the university. This could result in failing the course and possible expulsion from IU.

Examples of Academic dishonesty include but are not limited to:

- Using someone else’s ideas or words in your paper without proper citation.
- Turning in an assignment as your own that has been written by another student, internet service, or source other than yourself.
- Attempting to obtain an answer from someone else’s exam or quiz.
- Using unauthorized materials, such as notes, during an exam or quiz.

See the Academic Misconduct section of the Student Code for more details. Details on my expectations for your use of citations are included in section “IV. GRADING” of this syllabus. Feel free to see me with any questions about what constitutes plagiarism or how to avoid it.

**MORE RESOURCES ON PLAGIARISM:**

http://www.indiana.edu/~college/plagiarism/index.shtml
http://owl.english.purdue.edu/handouts/research/r_plagiar.html
http://gervaseprograms.georgetown.edu/honor/system/53377.html
http://www.education.indiana.edu/~frick/plagiarism/
Course Requirements

1. DAILY CLASS ATTENDANCE, COMPLETION OF ALL READINGS AND ASSIGNMENTS AND ACTIVE PARTICIPATION AND CONTRIBUTIONS TO CLASS DISCUSSION AND ACTIVITIES

100 points = 10% of course grade

Read the attendance policy on page 2 of this syllabus for details on how more than three absences will negatively impact your grade. Also read the sections on page 2 about late assignments and on page 3 about my expectations for your participation in class.

We will be reading the two required texts and additional readings will be posted on the OnCourse.

2. TESTS

2 x 200 points each = 400 points (40%) of course grade

You will take two unit tests during the semester. The dates are in the syllabus. Tests will cover all assigned course material for that period of time. The format may include multiple choice, true/false, term definition, and essays. Answers to tests will be graded on (1) accuracy, and (2) your ability to incorporate material from a variety of sources, including your assigned readings, service-learning experiences, lectures and class discussions.

3. SERVICE-LEARNING VOLUNTEER HOURS AND REFLECTION JOURNAL

3 journals x 50 points each = 150 points (15%) of course grade

Experiential learning is an crucial aspect of this course, and your experiences will form the basis of discussion for the topics we cover in class and for your final group paper (see page 4). Due to the importance of your service-learning experience I expect that you will work with your organization for 3 to 5 hours a week for 11 weeks during the semester, from September 13th through December 3rd, not including the week of Thanksgiving. You will need to turn in a time sheet signed by your supervisor at your nonprofit organization to me at the end of each month. The time sheets can be found on OnCourse and the due dates are on the syllabus. If any of the hours that work on your project (not the final paper) are not at the organization you will need to show your supervisor the work you have done during that time so that they will sign off on your hours.

I understand that your hours will fluctuate depending on the organization that you work with, some weeks you will work more and some you will work less. But my expectation is that you are volunteering on average 3 to 5 hours every week. I will use your time sheets to determine the regularity of your volunteer hours. If at the end of the semester you have not completed the minimum requirement of 33 hours (3 hours a week for 11 weeks) then I will deduct 10 points (1% of your course grade) for each hour that you do not complete. If you are having difficulty scheduling hours with your nonprofit organization please see me as soon as possible.

Additionally you will need to turn in 3 journal assignments throughout the semester. These will be a minimum of 3 pages each. The due dates for the journals are in the syllabus. Do not just explain what you have been doing also reflect on what you are learning from the experience. Below are some questions you can consider answering in your journal reflection papers.

> How has your service experience related to the class material?
> What has been challenging about your service experience? What has been rewarding? Why?
> What have you learned from your service experience and how will it be useful to you in the future?
> How has your service experience impacted your thoughts of working in the nonprofit sector?
4. GROUP SERVICE-LEARNING PROJECT, FINAL PAPER AND PRESENTATION

350 points (35%) of course grade: 50 points (5%) paper outline and email updates, 250 points (25%) final paper, and 50 points (5%) final presentation

**Task:** You will work in a team with four or five students for 11 weeks of the semester directly with a local nonprofit organization on a volunteer activity relevant to nonprofit management, broadly defined. This may include activities such as event planning, marketing, direct service (working with kids, staffing a help line, etc.), or research and report writing for the organization. **You are each required to work three to five hours per week on your service-learning project.**

**Choosing the project:** You will choose your project from a list of project options and organizations that I will distribute on the first day of class. Team assignments will be made depending on student interests in particular projects. With my approval, you are also welcome to form your own team and to propose projects from other organizations that you already work with.

**Working with a nonprofit:** You must contact your host organization by the second week of classes and start your volunteer hours by the week of September 13th. You will negotiate with your organization what tasks your team will perform, but the project is outlined generally in the descriptions you received on the first day of class. Expect to go through regular volunteer screening and orientation procedures at your organization and plan ahead because this process can take some time. As noted above you will need to turn in a time sheet signed by your supervisor at your nonprofit organization to me at the end of each month. Please let me know immediately if any problems arise as you begin your service-learning projects.

**My expectations:** I expect that you will work with your organization in a professional manner and that your volunteer service will result in quality work that is useful to the organization. Your final paper assignment will be to gain enough understanding of your organization to accurately and thoughtfully answer most of the management questions posed below in the paper outline, to reflect on your experience and to apply what you have learned in class to your organization.

**The nonprofit agency’s expectations of you:** You are there as volunteers, as students, and as nonprofit management resources. Your supervisors have been made aware of your course requirements but you will need to communicate with them regularly, be reliable volunteers and be flexible depending on the needs of the organization. Their staff will be spending precious time and energy working with you. In return, you should offer them useful feedback, applied knowledge, suggestions, and a strong willingness to help. You must observe a professional demeanor which includes being on time, communicating respectfully with the members of the organization, dressing appropriately, and following the rules and regulations of the organization.

**Your relationship with the nonprofit agency:** Your team must fill out and sign a “memo of agreement” with your nonprofit agency that describes what you plan to accomplish, the deliverables, what you need from them organization and what they need from you in the way of regular meeting times, information, communication, etc. This agreement will benefit your team and your nonprofit organization by allowing everyone to be on the same page and to plan ahead. The “memo of agreement” form can be found on OnCourse and must be turned in with your project outline.

**IMPORTANT NOTE:** You will need to print and share a second copy of your final paper and any deliverables directly with your host nonprofit organization. If you do this in advance of the paper deadline, you may get valuable feedback from the organization that will help your team improve your final paper and your course grade.

**Getting help from the nonprofit:** You will be able to obtain information from the nonprofit in a variety of ways. First, read the organization’s website and all available marketing materials. Once you have some understanding of the organization you should ask for one formal interview with the executive director and/or volunteer coordinator early in the semester. PLAN AHEAD for their sake and expect to have to make an appointment. Also, you may find it useful to meet with the financial officer or the chief fundraiser depending on what management questions you answer in your final report. Second, obtain publicly available information such as board lists, annual reports and financial reports, form 990s, etc. Third, ask for information that is not publicly available, such as strategic plans. Also ask to sit in on a board meeting (they may say no, but it’s worth asking). Finally, consult the vast number of library and internet resources on nonprofit management.
Who does what? The work should be equally divided between your team members. There should not be any free riders in the group, but the team may decide who does what. I suggest you approach this task based on what skills your team members bring or wish to develop. It helps to elect a team ‘coordinator’ and to assign specific roles early on. Some teams also elect a ‘paper coordinator/editor.’ In order to facilitate clear communication with your agency, it can be useful to choose one person who will be responsible for communicating with the agency so that they are not overwhelmed by emails and calls from various members of your group. Note again that work needs to be EQUALLY DIVIDED. You will want to set up regular meeting times for your group to work on this project. Make sure that your team is communicating with one another regularly and that you are cooperating in order to do quality work for your organization. At the end of the semester each group member will confidentially evaluate the participation of the other group members to determine if the work was evenly distributed (see the grading criteria below). Your team should come up with a “team contract” that outlines the specific responsibilities each of the team members will have. This “team contract” will be turned in with your project outline.

Getting help from the instructor: Service-learning projects and team-based work can pose challenges. I am available as a resource throughout the semester. If you are having a problem with your team or your service site please feel free to come to me for advice as soon as possible. You will also be given limited in-class time to meet with your team and I may ask to meet with your team at some point during the semester to check in on how things are going. You should also feel free to invite me to any important events or meetings with your host organization.

DELIVERABLES AND GRADING FOR THE
SERVICE-LEARNING PROJECT PAPER AND PRESENTATION:

1. OUTLINE and EMAIL UPDATES:

All teams will submit an outline on 9/28. This is worth 5% of your course grade. This outline should be at least 5 pages. All work is team written and team graded – no separate papers are necessary. Put some effort and thought into this paper – it should be more than a rough draft. It should be a well organized and professionally presented product that has been carefully edited. Please submit a paper copy and send me an electronic copy of the outline.

The outlines should include:

- The name and a brief description of your selected organization.
- A detailed outline of your service-learning project plans, what your deliverables will be for your agency, and the work accomplished to date.
- What course material or additional reading material you plan to apply to the organization and the project. Please include a prospective reading list (bibliography) that incorporates material beyond the course textbooks, and a plan for what information will be collected from the organization and how.
- Your “memo of agreement” with the agency
- A signed informed consent from each student in your team, these are available at: http://www.indiana.edu/~copsl/download.php?student=true
- Your “Team Contract” detailing your agreement on who will do what within your team for the service-learning project and the final paper.
- I also encourage (but do not require) a statement that describes your team’s Mission and Values. This document would mirror a mission/values statement for a nonprofit organization, but would reflect your team’s goals. The values you might consider incorporating include communication, commitment to quality, etc.

Additionally I will need email updates from your group twice during the semester. These updates should clearly describe what progress you have made on your project and paper so far, any issues the team is having or any issues with the service site, and what your next steps are. You will need to have one person in your group send me an email updates on October 19 and November 4.
2. **FINAL PAPER: Due Friday Dec. 10 at 4 p.m.** in my mailbox at SPEA 341.

Papers received after this time will receive a grade penalty. All papers should use the following outline and should be 15-20 pages in length. Additionally you must include citations and a bibliography. Your goal for this paper is to synthesize your service-learning experience and your classroom learning. Do not just tell me about your organization, I want you to analyze the organization and apply what you have learned about nonprofit management and best practices throughout the semester. Feel free to go beyond this guide and include other nonprofit management topics that apply to your organization, but your are required to answer the bold faced questions below.

1. **Mission analysis**
   a. What is its tax status? What does this mean for the organization?
   b. What is its mission? Evaluate the mission: What is good about it? How could it be improved?
   c. Major programs and services?
   d. What evidence do you get from 990s or elsewhere that the tax status is consistent with its mission?
   e. How is the mission statement structured, and is the structure consistent with recommendations made by Migliore and other experts you read in class?

2. **Organizational analysis**
   a. How is this nonprofit structured?
   b. How is this nonprofit Managed? Governed? What is the role of the ED and the Board?
   c. Does this organization engage in political advocacy? Do they lobby? Is how this organization engages in political activity consistent with recommendations in the management literature, or do you have any suggestions for them?
   d. At what stage of organizational life cycle do you find this organization? Why?
   e. What human resource management tools that we have discussed in class are used by this organization?
   f. How are volunteers involved?
   g. How were you managed as a volunteer? Were recruitment, training, retention practices consistent with what you have read in class, or would you make any recommendations for improvement? Is volunteer retention a concern for this organization?

3. **Financial analysis**
   (explain what financial info you looked at for the organization i.e. budgets, P&L statements, 990s, etc.)
   a. Note in your paper any interesting facts about the organization that you find through the 990.
   b. Describe this organization’s revenue sources and compare them with trends discussed in class.
   c. Describe this organization’s expenses and compare them with nonprofit performance expectations set by various charity watchdog groups.
   d. Perform a trend analysis of this organization’s financial status using principles of financial management discussed in Herzlinger and Nitterhouse or any other source you find (but defend your choice of sources).
   e. Does the organization have UBTI? What does this mean for the organization?

4. **Performance management**
   a. Does this organization operate under a strategic plan?
   b. How does this organization measure and report its effectiveness?
   c. Do you see any evidence of ways in which the organization has operationalized ethical practices and principles into its mission or operations?

5. **Project Description and Team dynamics**
   a. What did your team do for this organization? Who did what? What was accomplished that will help this NPO be more effective? Was there a difference between expected outcomes and actual outcomes, and why?
   b. What are the most important lessons that you learned and how will they help you in the future?
   c. What did you learn about team dynamics in this class? i.e., what would you want to tell the next V362 students about effective teamwork?
   d. You must include copies of all deliverables that you created for the organization with your final paper.

6. **Your recommendations**
   a. Based on all of the information you have accumulated, your observations and experiences, what recommendations can you make to this organization to improve its operations in the above areas (be sure to include recommendations for volunteer management)? Be sure to provide evidence (meaning, compare the nonprofit’s practices to the best practices discussed in class). Be sure to cite the sources for your recommendations.

NOTE: You may not easily be able to find information on all of these topics. If you are having difficulty, come see me.
3. Group presentation on your team’s service-learning project and final paper

Your group will need to present a 10-15 minute Power Point presentation describing:

- The organization you worked with
- The service project that you did for the agency and how you accomplished it
- What you learned from the experience
- Your recommendations for the agency based on what you have learned in class

Presentations will be held on December 2nd, 7th and 9th in class. Please be sure to invite the project supervisor from your nonprofit organization and any other members of the organization that you worked with to your final presentation.

**GRADING**

I grade assignments based on:

**Quality of analysis:** Thoroughness with which student answers the questions I posed, including quality (clarity, thoughtfulness and accuracy) of the analysis.

**Quality of the research**, including extent to which you have made use of the assigned readings and additional reading material you find.

**Quality of the writing** (when applicable): proofread, edited, correct use of grammar and punctuation, well organized. Note that I need a bibliography with sources and correct in-text citations.

**Quality of the presentation** (when applicable): professional looking Power Point presentation, clear speaking ability, content includes required topics in an understandable way, meets time requirements.

**Feedback that I receive from your service project sites** on how your service-learning project went. Adjustments to the grades may be made based on this feedback.

**Grading team projects and group presentations:** All team members will share the grade for the final paper and presentation, with one exception: students will complete a confidential “Peer Evaluation” at the end of the semester in which they grade their team members on the quality of their work and level of effort on the group project. If the peer grades are low and show that work was unevenly or unfairly distributed within a team project, adjustments to individual’s grades may be made. Students should be aware that it is a violation of the academic conduct code to either take credit for work that is not one’s own, or to tolerate this behavior in others. Usually, conflicts that arise within teams can be addressed successfully if they are dealt with early on. Please don’t hesitate to share concerns with me as soon as possible.

**Incompletes:** The school policy on incomplete grades is that they can only be considered if most of the course work has been completed (80% at least) and a student is physically unable to complete the remainder.
FOR ALL STUDENTS AND ALL WRITTEN ASSIGNMENTS, PLEASE FOLLOW THE FOLLOWING GUIDELINES:

- All papers should be double-spaced, in 12-point “Times” font, using 1-inch margins, and have page numbers.

- Graphics, photos and figures are welcome, but should not be excessive. Extensive material that is not original (not your own) should be placed in an appendix and cited.

- You are welcome to place copies of any relevant organizational materials or examples in appendices. Label your appendices and explain somewhere what they are and why they’re there.

- Papers should be professional, well organized and well edited. Write as if you were going to submit your paper to a nonprofit board of directors.

- Quality Control: Do not submit first drafts. Do not write the paper the night before it is due. Do produce a high-quality, carefully edited paper that reflects the thoughtful work you put into the entire project. I will be available any time during the semester to meet with you to discuss content, react to ideas, and offer suggestions. Please also make use of the other writing resources you have on campus.

Citations and Bibliography:

- A bibliography is **mandatory** on all written work.

- You will be graded on your ability to use a proper citation style. Any citation style (MLA, APA, Chicago) is acceptable as long as it is properly and consistently followed. The key is that I must be able to track all of your citations to their sources, so be aware that it is not enough to attach a bibliography – I require in-text citation.

- Be sure that ALL material you use is properly attributed to its author. If you quote directly from any source, you must use quotation marks and provide a source along with author info (e.g., page number or URL). If you paraphrase without quotes, you must still include the source of the citation. If you don’t understand how to accomplish this, see me.

- Do not use anonymous sources. I will not accept them. This includes Wikipedia, ask.com, and any other source where you cannot identify the author. It is permissible, however, to quote an organization as the author of an article (e.g., Smith Bucklin & Associates, Independent Sector).

- Please note that Steven Ott did not write the textbook, he only edited it. Anything from the textbook should cite the author of that chapter (Brudney, Kearns, Tschirhart, etc.).

Academic Writing Support:

For help in any phase of the writing process – from brainstorming to polishing the final draft – call the Writing Tutorial Service office (WTS) at 855-6738 for an appointment or to determine hours of operation. You can also visit their website at [http://www.indiana.edu/~wts/wts/](http://www.indiana.edu/~wts/wts/).
**Extra credit opportunity:**
In order to learn more about the local Bloomington nonprofit sector I encourage you to attend other nonprofit organization’s events throughout the semester. You will see many nonprofit events advertised in the IDS and Herald Times newspapers. These events will range from fundraising events to service opportunities. I think that it is so important for you to get a better feel for what other nonprofits are doing that if you attend an event of a nonprofit, other than the one that you are doing your service-learning project at, I will add an extra **20 points (2%)** to your final grade. (You can take advantage of this extra credit opportunity once during the semester, but feel free to attend as many events at you like.)

To receive the extra credit here is what you must do:
1. **Attend** a local nonprofit event
2. Turn in a piece of **evidence** from the event (i.e. a flyer, brochure, photo of you at the event, a program, etc.
3. Write a **3 page journal reaction** about the event. Explain the event. What was the goal of the event? What did you learn from the event? What did you think worked well and what could have been improved and why? Apply what you have learned in class and from the reading to the event. Think about all aspects of the event: fundraising, marketing, volunteer management, staffing, event planning, etc.

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**COURSE SCHEDULE AND ACTIVITIES**

***This is the tentative schedule for this course, but it may need slight adjustments as we move through the semester. Any changes will be announced in class prior to the effective date and you are responsible for keeping up with those changes.

**SECTION ONE: INTRODUCTION TO NONPROFIT MANAGEMENT**

**Tues. 8/31**
Introduction and Purpose of Course
Discussion review
Nonprofit knowledge quiz and discussion

**Thu. 9/2**
Overview of the Nonprofit Sector

*Reading Assignment:* Salamon, The Resilient Sector (entire book)

Questions to think about:
For the trends that Salamon identifies, what management challenges and opportunities does he see in them for NPOs? In your own opinion, has Salamon left out any important trends, challenges or opportunities?
Tuesday, 9/7  How to Incorporate and other Legal Issues

**Reading Assignments:** Ott, pages 51-91 (The Legal Framework, Chapters 5 & 6)
IRS Forms, see http://www.irs.gov  Link: “Charities & Nonprofits”

Resources: “Forms and Documents,” look at Publication 557 and Forms 1023, 990
“Keeping the IRS Happy” at http://form1023help.com/_wsn/page17.html
Indiana Guide to Nonprofit Incorporation (OnCourse)
Indiana state resources at:
    http://www.in.gov/dor/3506.htm

Questions to think about:
What are the principal steps for an Indiana nonprofit to incorporate in this state, and then to achieve recognition by the IRS as a tax-exempt organization at the federal level.

Thursday, 9/9  Mission development in NPOs

**Reading Assignment:** Chapter 3: Defining Organizational Purpose in Migliore’s  “Strategic Planning for NPOs” (posted as a pdf in OnCourse)

Questions to think about:
Migliore outlines basic elements covered in a mission statement and a statement of purpose. Using the internet or your personal resources, find a nonprofit organization’s mission statement and analyze it according to Migliore’s criteria. To what extent has this organization followed Migliore’s outline? And if a different approach is taken, to what extent does it succeed?

**SECTION TWO: LEADING AND MANAGING NONPROFITS**

**You are required to start volunteering with your organization, for 3-5 hours a week, by this week at the latest.**

Tuesday, 9/14  Governance and Leadership: The Board of Directors

**Reading Assignments:** Ott, pages 1-24 (Governance, Chapters 1, Murray and 2, Block)
“Chapter Two: Working Together” (pages 27-54) in Smith, Bucklin, The Complete Guide to Nonprofit Management (OnCourse)

Questions to think about:
What do these authors identify as the most important responsibilities and qualities of a NP board? Try to distinguish between what is REQUIRED of boards and what is merely DESIRABLE.

Thursday, 9/16  Governance and Leadership: Executive Directors

**Reading Assignments:** Ott, pages 93 -99 (Part 3), pages 100-107 (Chapter 7, Block), pages 120-126 (Chapter 9, Tschirhart)

Questions to think about:
The textbook asks the question, “who leads in a nonprofit organization?” Using the assigned reading, think about some of the ways in which this question can be answered, paying special attention to ways in which the roles of the board and CEO can be defined. Also think about how successful leadership can be defined according to Tschirhart and others.
Tues. 9/21  Strategic Planning

**Reading Assignments:** Ott, pages 127-141 (Chapter 10, Bryson)
“Chapter One: Establishing the Organization’s Direction,” (pages 3-26) in Smith, Bucklin, The Complete Guide to Nonprofit Management (OnCourse)

Questions to think about:
What are the key steps to strategic planning described in these readings? Are there any commonalities you see in the strategic planning approaches recommended by Bryson and S/B?
If you are working with a NPO this semester, think about some of the key issues this organization might face using a SWOT analysis, and what your recommendations for how the organization might address each of them might be.

Thu. 9/23  Organizational life cycles

**Reading Assignment:** Light, P. The spiral of sustainable excellence. The Responsibility of Leadership, 11(4), Winter 2004. (OnCourse)
http://www.managementhelp.org/misc/founders.htm
http://www.help4nonprofits.com/NP_Bd_FoundersSyndrome_Art.htm
http://www.managementhelp.org/org_thry/org_cycl.htm

Questions to think about:
Think about the organization you are working with this semester in the context of life cycle theory. What organizational life stage do you find your nonprofit at? What does that mean for management? Any signs of founder’s syndrome? If so, how can you address it? Critique the readings and models. Which are most useful for you in understanding your organization?

Tues. 9/28  **Due in class today: group project outlines **

Class discussion, Independent Sector “Principles for Good Governance”
The principles can be found at http://www.nonprofitpanel.org/ and

Questions to think about:
Think of a nonprofit organization with which you are familiar. Which of the 33 principles does it follow? Which does it not follow? Should it? Why or why not?

Thu. 9/30  **Due in class today: September time sheets and journals**

Test review, group project time, final paper questions (attendance required)

Tues. 10/5  *****TEST #1 ******

Thu. 10/7  Human Resources Management in NPOs


Also, browse these websites: http://www.mapnp.org/library/hr_mgmnt/hr_mgmnt.htm AND http://www.mncn.org/info/basic_hr.htm#Personnel%20Policies
Tues. 10/12 Volunteer Management

**Reading Assignment:** Ott, pages 309-323, 329-338 (Voluntarism, Part 9, Chapters 27, Brudney; 29, Brudney; 30, Scheier)

Questions to think about:
Read Brudney’s Chapter 27, and then go online and explore the ways that volunteer contributions are ‘valued’ in dollar terms. (Just Google “valuing volunteers”; also go to www.independentsector.org on volunteer dollar value). How is financial value attached to volunteer labor, and in your opinion what are the approaches that seem most valid. Think about whether the NPO you are volunteering for could accomplish these valuing methods. (Note: I have more resources in the appendix.)

Thu. 10/14 Marketing

**Reading Assignment:** “Ch. 3: Marketing and Ch. 8: Public Relations” (55-79, 169-204) in Smith, Bucklin, The Complete Guide to Nonprofit Management (OnCourse)

Questions to think about:
Based on these chapters and what you have read in class so far, what is the SAME and what is DIFFERENT about marketing within nonprofit organizations when compared to business (commercial) marketing?

Tues. 10/19 **Project email updates due today**

**Fundraising**

**Reading Assignment:** Ott, Chapters 13, 14, 15, 16 (pp. 167-210)
“Chapter Five: Raising Money to Serve Your Cause” (pages 97-122) in Smith, Bucklin, The Complete Guide to Nonprofit Management (OnCourse)

Questions to think about:
Most people approach fundraising with some anxiety, despite its importance to NPOs. What suggestions do you get from Gelles, Froelich, Sargeant and Kahler, Boris, and Smith and Bucklin that help make successful fundraising look more achievable?

Thu. 10/21 Case Study: TBA

Tues. 10/26 Financial Management

**Reading Assignment:** Ott, pages 283-307 (Budgets, Chapters 24, 25, 26)

Questions to think about:
Identify a nonprofit organization for which you can find budget information (scan the Internet for nonprofit news articles, use 990 information returns on Guidestar, or use an organization you volunteer with). In what ways does this organization reflect or not reflect the financial management principles described in these chapters? Think especially about the four management principles described by Herzlinger and Nitterhouse, and about the accounting controls described by Wolf.
Thu. 10/28  The 990: Dissecting a Nonprofit “Tax Return”

Reading Assignment: How to Read a 990 Form  http://www.npccny.org/Form_990/990.htm

Questions to think about:
What are the major changes in the new 990 form and how will they impact nonprofit reporting? Are practitioners in agreement with the IRS about the effectiveness of the new form? Based on your own look at the new 990, what do you think will be most useful for NPOs, and what might be most problematic? What are the public benefits of the new 990? Do the benefits outweigh any additional reporting burden?

Tues. 11/2  **Due in class today: October time sheets and journals**

Commercialism and UBTI

Reading Assignment: Ott, pp. 211-238 (Part 6, Chapters 17, 18, 19)
Hopkins, Chapter 12: “When possible, make it related” (OnCourse)
Also go to http://www.redcross.org/sponsors/howtohelp/dollars.html and examine how corporate donors support the ARC through “cause-related marketing”

Questions to think about:
What does “keeping it ‘related’” mean and why is this important to a NPO? What are some specific recommendations for how the organization you are volunteering with could increase its earned income with a minimal impact on its taxes?

Thu. 11/4  **Project email updates due today**

Political Advocacy: Nonprofit Rights and Obligations

Reading Assignment:
http://www.clpi.org/faq.aspx
http://www.irs.gov/newsroom/article/0,,id=154712,00.html
http://www.independentsector.org/programs/gr/lobbyguide.html
http://www.mncn.org/lobbylaw.htm#whatis

Questions to think about:
How are nonprofit political advocacy, nonprofit lobbying and political campaign intervention (AKA ‘electioneering’) define and what are the differences between them. How does NPO tax status determine what they can and cannot do politically? (Hint: the important difference is between c-3 and c-4 organizations, but there other differences along the nonprofit spectrum, such as 527 orgs versus everyone else). Think of a nonprofit you are familiar with. In what ways might this organization have engaged in political activity during 2008? What guidance would you have provided the organization about how to do this legally? Would it have made sense for this organization to take the 501-h election? Why or why not?

Tues. 11/9  Test review, group project time, final paper questions (attendance required)

Thu. 11/11  ***** Test #2  *****
SECTION THREE: MANAGERIAL CHALLENGES

Tues. 11/16  Accountability, Evaluation and Organizational Effectiveness

**Reading Assignment:** Ott, pp. 345-365 (Intro, Chapters 31, 32)
“Chapter 3: Anatomy of a Dysfunctional Nonprofit” (pages 49-65) in Sarbanes-Oxley and Nonprofit Management (Jackson and Fogarty). (OnCourse)

Questions to think about:
These chapters discuss the difficulty that nonprofits and their stakeholders face in measuring organizational effectiveness. Based on these readings, what makes this task so difficult? Where is the best guidance for nonprofits that seek to evaluate their effectiveness?

Thu. 11/18  Nonprofit Ethics

**Reading Assignment:** Ott, Chapter 8 (pp. 108-119)

Recommended but not required additional reading: “Ethical and Operational Standards for Indiana Community Foundations” at http://www.indianagrantmakers.org/pdfs/ETHICS%20FINAL%202.03.pdf and

Questions to think about:
Find a set of “values” or other ethical principles that a nonprofit has created. To what extent do they reflect the “model” codes of ethics described by Jeavons in Ott, or by Independent Sector?

Tues. 11/23  No Class

Thu. 11/25  HAPPY THANKSGIVING

Tues. 11/30  Case Study and Group Discussion, Accountability at the Red Cross

**Reading Assignment:** Gazley, “9/11, Tsunamis and Katrina: The American Red Cross and Accountability” (OnCourse)
American National Red Cross at www.redcross.org
Sontag, S. 2002. Who brought Bernadine Healy down?
Come prepared to discuss the questions posed in the case study

Questions to think about:
What do Kearns, Paddock and Herman and Renz have to say that sheds light on notions of effectiveness and efficiency?

Thu. 12/2  **Due in class today: November time sheets and journals**
**Group Project Presentations**
Tues. 12/7   Group Project Presentations

Thu. 12/9   Group Project Presentations
            Class Evaluations

Fri. 12/10  All papers due by 4 p.m. in my mailbox in SPEA 341.

**HAVE A GREAT WINTER BREAK!**

**Additional Resources:**

**GENERAL**
http://www.jhu.edu/listeningpost/ interesting current research on state of the sector from The Listening Post Project of the JHU Center for Civil Society

www.charitychannel.com  great overall resource, with many useful listserves. I strongly encourage you to subscribe to some of their listserves during the semester, especially Charity-Talk (“The Big Tent”). Unfortunately, there’s a fee.

www.npgoodpractice.org  A resource from Grand Valley State University’s Johnson Center on Philanthropy. A great glossary of nonprofit terms you will encounter in this class.

**INCORPORATION / NONPROFIT LAW**
http://apps.irs.gov/charities/index.html  The IRS’s resources, forms & more site

http://www.cnmsocal.org/Services/p_grgs.html  On deciding whether to incorporate

IRS 990 forms at Guidestar:
www.guidestar.org  Login: bgazley@indiana.edu, Password: speaspea

Legal website with resources for tax-exempt organizations.
http://www.nolo.com/resource.cfm/catID/CE94A6B3-EBF6-4036-8498D5414328FD73/111/262/

**PERFORMANCE AND ACCOUNTABILITY**
http://www.nonprofitrisk.org/ NonProfit Risk Management Center

http://bowlingalone.com/StateMeasures.xls. An extension of Putnam’s research

Standards for Excellence Institute

Compendium of standards for excellence via Independent Sector
http://www.independentsector.org/issues/accountability/standards2.html
NATIONAL ADVOCACY AND RESEARCH ORGANIZATIONS:
• http://www.ncna.org/ National Council for Nonprofit Associations
• http://www.nonprofitcongress.org/ New advocacy org
• http://www.independentsector.org Major national research and advocacy org
• http://www.arnova.org Website for the Association for Research on Nonprofit Organizations and Voluntary Action. I strongly encourage you to subscribe to the free listserv for the semester.
• http://www.ombwatch.org/npadv Covers nonprofit advocacy

STRATEGIC PLANNING


NONPROFIT POLITICAL ACTIVITY
Background on public law for 501-c-4s and 527 regarding issue advocacy and electioneering
http://www.ombwatch.org/article/articleview/4364/

Lobbying and the Law
http://www.mncn.org/lobbylaw.htm

Nonprofit Advocacy and Lobbying
http://www.independentsector.org/programs/gr/advocacy_lobbying.htm

Alliance for Justice
Worry Free Lobbying for Nonprofits

The Center for Nonprofits
Non-Profit Organizations CAN Lobby
http://www.njnonprofits.org/NPsCanLobby.html

Can 501(c)(3) Nonprofit Organizations Receiving Federal Grants Lobby?
http://www.npaction.org/article/articleview/100/1/248

Summary of federal rules about lobbying for 501(c)(3) organizations

Permissible Lobbying for 501(c)(3) Nonprofit Organizations: Three Questions
http://www.ombwatch.org/article/articleview/599/1/49?TopicID=1
NONPROFIT SALARY SURVEYS
Note: the most current info will charge an access fee.


http://jobstar.org/tools/salary/sal-prof.php#NonProfit


http://www.nptimes.com/

http://www.snpo.org/samples/V200131.pdf

salary.com, monster.com, careerbuilders.com

http://www.abbott-langer.com/

VOLUNTEER MANAGEMENT


http://rgkcenter.utexas.edu/investigator/ Find the issue devoted to valuing volunteer time.