Baucus Institute Department of Public Administration & Policy  
NPAD 467: Advanced Nonprofit Administration  
Syllabus: Spring 2021  
The University of Montana

"The University of Montana acknowledges that we are in the aboriginal territories of the Salish and Kalispel people. We honor the path they have always shown us in caring for this place for the generations to come."

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**Location:** Law 101  
**Time:** Thursdays, 3:30 p.m. – 5:00 p.m.  
**Instructor:** Keri McWilliams, MPA  
**Email:** keri.mcwilliams@mso.umt.edu  
**Phone:** (406) 544-3904  
**Office Hours:** I am more than happy (and look forward) to meeting with you at any point in the semester. I’m always available after class or by appointment.  
**Teaching Assistant:** Cara Grewell | MPA Candidate | cara.grewell@umconnect.umt.edu

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**COVID-19 Course Statement**

Central to UM’s Department of Public Administration and Policy's (DPAP) public service mission is collectively working together. This is more important than ever during these unprecedented times. DPAP will follow federal, state, local, university and CDC guidelines for COVID-19.

Although this course does have an attendance policy that should be followed, the Department asks students to stay home if they are sick. Doing so will not negatively impact assessment of student performance in this course. If a student, a member of their family or immediate social group becomes symptomatic, please follow federal, state, local, university, and CDC guidance and work with the DPAP department chair and course professor to complete required coursework.

Students are required to wash/sanitize their hands before and after class. Please limit leaving the classroom during class time unless an emergency. Each student is required to wear a facemask during the entirety of class and maintain social distancing requirements. The professor will wear a mask or face shield in accordance with federal, state, local, university, and CDC guidelines during class time and if in-person office hours are held.

If federal, state, local, university or CDC policy changes during the semester and impacts in-person course delivery, this class will shift to fully online. The quality of student education will not be impacted as DPAP is nationally recognized for its ability to teach across modalities. Please take the time to review our [Department’s COVID-Safe FAQ guide](#).

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**Defining a Blended Course**

Due to COVID-19, this in-person course is using a blended approach. Blended course delivery means we will meet in person, via zoom or online. If something impacts our in-person component, students will receive a revised course schedule. Thank you for your patience and understanding as we navigate COVID together.
Course Description

NPAD 467, Advanced Nonprofit Administration, is a core course in the undergraduate Minor in Nonprofit Administration at The University of Montana. NPAD 466, Nonprofit Administration and Public Service, is a prerequisite for this course.

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, strategic planning and financial management. Specific objectives for the four areas of focus are as follows:

Grant Writing Objectives:

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

Fund Development Objectives:

• Become familiar with current best practices for fund development;
• Understand the donor pyramid and how to cultivate donors;
• Discuss methodology and best practices in "making an ask";
• Write a comprehensive fund development plan for a nonprofit organization;
• Write an appeal letter; and
• Make a presentation to cultivate and engage an audience in the mission of a nonprofit organization.

Strategic Planning 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 Objectives:

• Identify basic terms and concepts associated with nonprofit financial and managerial accounting;
• Understand, interpret, and become comfortable with basic nonprofit financial statements, their functions and uses;
• Identify the role and function of generally accepted accounting principles (GAAPs) which affect nonprofits; 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. The instructor reserves the right to change syllabus content and required readings at any time, but will provide advanced notice of any changes to students.

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.

Moodle
Although this is an in-person class, we will also be using Moodle for weekly discussions, links to readings, and access to recorded lectures/interviews with guest speakers, etc. When submitting assignments on Moodle, students should attach files as Microsoft Word documents.

Digital Etiquette
Make sure cell phones are silenced and are not accessed during class. Laptops or other electronic devices are not to be used for non-course related activities during class. When we are on Zoom, mute your microphone when not speaking and consider turning your camera on in order to fully engage with your classmates and instructor.

Help with Technology
Please make sure your Internet browser settings meets the requirements to be Moodle compatible. Call UM Online by phone (406-243-4999) or email umonline-help@umontana.edu if technological problems arise. There is no call assistance during nights and weekends.

UM Writing Center
The University of Montana’s Writing and Public Speaker Center is a valuable resource. To schedule an appointment visit: http://www.umt.edu/writingcenter.
Grading
Grading will be based on a cumulative point total of **600 points for undergraduate students** and **700 points for graduate students**. You will receive feedback/grades on your work within ten business days. *All assignments are described in detail 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.
  - 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 10 minute presentation on the nonprofit of their choice; audio/visual aid is optional.
  - 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 five funding sources for your designated nonprofit and complete worksheet provided (25 points)
  - Submission of a first draft of a 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**

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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 of Montana. All students need to be familiar with the Student Conduct Code which can be accessed at https://www.umt.edu/student-affairs/community-standards/student-code-of-conduct-2020.pdf

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. Students must always be very careful to acknowledge any kind of borrowing that is included in their work. This means not only borrowed wording but also ideas. Acknowledgment of whatever is not one's own original work is the proper and honest use of sources. Failure to acknowledge whatever is not one's own original work is plagiarism.

Disability Services

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 modification 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.

COURSE SCHEDULE

JAN. 14 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.

JAN. 21 Grant Writing: Customizing your Proposal

CLASS ACTIVITIES:
- Discussion/Lecture: Writing cover letters and letters of inquiry; articulating organization/project/program needs; writing goals and objectives; creating timelines; identifying key personnel; creating budgets and budget narratives; and developing evaluation plans.
JAN. 28    Foundation Research

CLASS ACTIVITIES:
• 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. 4    Grant Writing: Pulling it all together

ASSIGNMENT DUE: Grant Prospect Worksheet

CLASS ACTIVITIES:
• Continued discussion/lecture on grant writing basics.

FEB. 11   Fund Development Overview

ASSIGNMENT DUE: First draft of your grant assignment. Upload to Moodle by 3:30 p.m. AND bring a printed copy to class for peer review and discussion.

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

FEB. 18   Major Gifts and Planned Giving

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.
• Introduction to major gifts and planned giving
• Discussion/lecture on bequests and developing legacy circles and declarations of intent.
• Remember to complete the mid-semester teaching evaluation!

FEB. 25   Capital Campaigns and Fund Development Wrap Up

ASSIGNMENT DUE: Final draft of grant

CLASS ACTIVITIES:
• Discussion/Lecture on Capital Campaigns

MARCH 4    No Class Today—Rest and Recharge!
MARCH 11  Strategic Planning: The larger vision

ASSIGNMENT DUE: Appeal Letter

CLASS ACTIVITIES:
- Introduction to the strategic planning process
  What is strategic planning?
  When to avoid strategic planning.
  Common steps to the strategic planning process.
  Planning to plan (developing a planning committee, identifying stakeholders, etc.)
  Defining mission, vision and values

MARCH 18  Strategic Planning Continued

CLASS ACTIVITIES:
- SWOT analysis activity
- Identifying strategic priorities
- Writing goals and objectives to achieve identified strategic priorities

MARCH 25  Strategic Planning Wrap-up

ASSIGNMENT DUE: Fund Development Plan

CLASS ACTIVITIES:
- Writing, implementing, monitoring and evaluating the strategic plan

APRIL 1  Financial Management Overview

CLASS ACTIVITIES:
- Introduction to financial management and nonprofit revenue sources including endowments, earned income and government grants and contracts

April 8  Financial Management Continued

CLASS ACTIVITIES:
- Lecture on budgets and budgeting

APRIL 15  Financial Management Continued

ASSIGNMENT DUE: Strategic Plan

CLASS ACTIVITIES:
- Understanding and reviewing financial statements
- Financial planning, audits and the Form 990
APRIL 22  Financial Management Wrap-up

CLASS ACTIVITIES:
- Managing cash flow
- Reporting financials to the board
- Review for final exam
- Remember to complete the end of semester teaching evaluation!

APRIL 29  CELEBRATION OF KNOWLEDGE (FINAL EXAM)
- Take home exam will be posted to Moodle on Monday, April 26th and due by 5 p.m. on Thursday, April 29