

# **NPAD 467: Advanced Nonprofit Administration Syllabus: Spring 2020**

## **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 214

**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:** 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:** Hallee Kansman, 2020 Juris Doctor | MPA Candidate;

[hallee.kansman@umconnect.umt.edu](mailto:hallee.kansman@umconnect.umt.edu)

### **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, Introduction to 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, financial management and strategic planning. Specific objectives of the four areas of focus are as follows:

#### **Grant Writing Objectives**

- Understand the 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 produce 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, 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 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;
- Create 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.

### **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.

### **Digital Etiquette**

Please turn off ring tones and other audible alerts on your cell phone before class begins. Laptops or other electronic devices are not to be used for non-course related activities during class. Please close your screens and turn off devices during group discussions or presentations.

### **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 15 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 (75 points)
  - Participation – (25 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**

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.

## **NPAD 467 ADVANCED NONPROFIT ADMINISTRATION**

### **JAN. 16 INTRODUCTION 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. 23 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.

### **JAN. 30 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. 6 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. 13 FUND DEVELOPMENT OVERVIEW**

**ASSIGNMENT DUE:** First draft of your grant assignment. Upload to Moodle and bring a 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. 20 ANNUAL CAMPAIGNS, MAJOR GIFTS, PLANNED GIVING & CAPITAL CAMPAIGNS**

**CLASS ACTIVITIES:**

- Discussion/lecture on direct mail and creating fund development plans.
- Discussion/lecture on bequests and developing legacy circles and declarations of intent.
- Introduction to major gifts and planned giving.
- Introduction to capital campaigns.

**FEB. 27 CAPITAL CAMPAIGNS**

**ASSIGNMENT DUE:** Final draft of grant

**CLASS WILL BE HELD OFF CAMPUS TODAY!** Meet at the Missoula Food Bank (1720 Wyoming St.) at 3:45 p.m. We will tour the Food Bank's new building and then make our way to Garden City Harvest (1657 River Road) to tour their new facility. After the tours, Missoula Food Bank Executive Director, Aaron Brock, and Garden City Harvest Executive Director, Jean Zosel, will provide a question and answer on their respective capital campaigns.

**MARCH 5 FUND DEVELOPMENT WRAP-UP AND INTRO TO STRATEGIC PLANNING**

**ASSIGNMENT DUE:** Appeal Letter

**CLASS ACTIVITIES:**

- Re-cap of last week's class on capital campaigns
- Continued discussion on creating fund development plans
- 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 12 STRATEGIC PLANNING: THE LARGER VISION**

**CLASS ACTIVITIES:**

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

**MARCH 19 SPRING BREAK!**

**MARCH 26 STRATEGIC PLANNING CONTINUED**

**CLASS ACTIVITIES:**

- Continued discussion on strategic planning
- Guest speaker: strategic planning consultant

**APRIL 2      STRATEGIC PLANNING WRAP-UP & INTRO TO FINANCIAL  
MANAGEMENT**

**ASSIGNMENT DUE:** Fund Development Plan

**CLASS ACTIVITIES:**

- Writing, implementing, monitoring and evaluating the strategic plan
- Introduction to Financial Management & Nonprofit Revenue Sources

**APRIL 9      FINANCIAL MANAGEMENT OVERVIEW**

**CLASS ACTIVITIES:**

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

**April 16      FINANCIAL MANAGEMENT: BUDGET GAMES**

**CLASS ACTIVITIES:**

- Lecture on budgets and budgeting
- Budget Game Exercise

**APRIL 23      FINANCIAL MANAGEMENT: FINANCIAL STATEMENTS & GOVERNMENT  
FUNDING**

**ASSIGNMENT DUE:** Strategic Plan

**CLASS ACTIVITIES:**

- Understanding and reviewing financial statements
- Government funding

**APRIL 30      FINANCIAL MANAGEMENT WRAP-UP**

**CLASS ACTIVITIES:**

- Financial management continued
- Review for final exam

**MAY 5      CELEBRATION OF KNOWLEDGE (FINAL EXAM)**

- Time: 1:10 – 3:10 p.m.
- Location: Law 214