

SOWK 7123 Program Design and Development
MNPO 7123 Theory and Management of Nonprofit Organizations
Fall 2008

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Office hours: Immediately after the class or by appointment.

COURSE DESCRIPTION

This course examines current issues, theories, policies, and methods in the development and management of nonprofit organizations, with emphasis upon strategic planning; resource acquisition through marketing, fund-raising, and grants; financial and managerial accounting; and human resources development, including the board, staff, and volunteers. This is a core course for students in the MNPO program, a concentration course for MSW-CEPD students, and an elective for others. The course design maximizes individual and group learning opportunities in developing and applying the content of the course. It also assumes that each participant is genuinely interested in extending his/her knowledge and skills as a manager and leader in this field. The course includes extensive individual and group work outside the class sessions. Please be aware that the readings and assignments grow more difficult and time consuming as the course proceeds, so don't let yourself get behind.

COURSE OBJECTIVES

This course emphasizes a number of learning objectives. Each participant is expected to demonstrate mastery of course objectives, content, and materials in each of the major topic areas. By the conclusion of the course, students are expected to be able to:

- identify and describe the major theories of organizations, legal and tax regulation, and the key concepts and principles of effective, ethical management
- demonstrate understanding of course content through production of development plan for a nonprofit organization
- define the components and steps of strategic planning processes
- understand the key personal, interpersonal, and organizational skills in the development of human resources, including diverse staff, board, and volunteers.
- understand key aspects of the acquisition of financial resources for a nonprofit program using basic techniques of market analysis, fund-raising campaigns, and preparation of grant proposals for funding sources
- apply basic accounting concepts and principles to the examination of a nonprofit organization's system for financial and managerial accounting, including balance sheets, budgets, financial ratios, and financial reports.

REQUIRED TEXT

Holland, T. & Ritvo (2008). *Nonprofit Organizations: Principles and Practices*. Columbia University Press.

All additional required reading materials are available on WebCT.

EXPECTATIONS OF STUDENT PERFORMANCE

1. Students are expected to arrive on time and remain for the entire session. Please note that more than two absences will result in the decrease of the student's final letter grade for the course by one whole letter. Doctor's notes will be accepted to excuse absences; however dates must match dates absent from class. Any other absences that reflect a student crisis such as emergencies etc., need to be verified through the Office of Student Affairs, Dr. Richard Rose (Assistant Vice President for Student Affairs) or Ms. Linda Edge (in the Office of Student Affairs 201 Holmes Hunter Academic Building; 542 3564) before absences are deemed excused. In addition, students will be excused for religious holidays. If you must miss a class, notify me as early as possible (preferably by email), and ask a classmate to collect materials and take notes for you. You are responsible to know about activities, announcements, and other important information shared in class, so arrange for your own communication system.
2. Students are required to read (and think about) all readings for the class in advance and are expected to actively and critically participate in class discussions.
3. Papers will be due at the beginning of the class on the assigned due date. Late papers will be penalized **30% of the available grade**. Papers will be considered late if they are turned in any time after the class period of the assigned due date. If you are ill on the date a paper is due, then you are responsible for submitting it electronically by 4.10pm on that same day.
4. Students will use APA Manual style in their writing. All assignments should be typed.

ASSIGNMENTS

- **Nonprofit Development Plan (80%)**. Students will demonstrate their understanding of course material through application as they work in teams to devise a development plan for a new nonprofit organization. The project will progress through the "incremental assignments", each addressing a particular step in starting and developing a nonprofit organization (see a course outline for the due dates). Those incremental assignments will address the major topics covered in the course, including, but not limited to: planning and development, human resources, marketing, fundraising, and managing financial resources.
- **Team presentation of a newly created nonprofit organization (10%)**. Student teams will present their plans to class members in 45-minute oral presentations. Students should also prepare a printed outline of the plan to be distributed to the audience when the presentation is made. Each team should submit its development plan to the instructor. E-mail submissions will not be accepted.
- **Participation and weekly team assignments (10%)**. Every week teams will be asked to complete certain assignments in preparation for the class (see an outline for more details). While those assignments will not be graded, points will be taken off for coming to the class unprepared.

GRADING SCALE

94-100	A	74-76	C
90-93	A-	70-73	C-
87-89	B+	65-69	D
84-86	B	64 and below	F
80-83	B-		
77-79	C+		

APPOINTMENTS

I will be happy to meet with any of you to discuss and/or clarify your evaluation proposal, assignments, or class material. Please e-mail me at kjaskyte@uga.edu in advance to set up an appointment.

SPECIAL NEEDS

Students with disabilities may request special accommodations. Students who experience personal or family emergencies that interfere with class attendance or completion of assignments should notify the instructor as soon as possible to make alternate arrangements to meet course requirements. In accordance with the *American with Disability Act* (1990), the UGA Institute for Nonprofit Organizations seeks to provide equal access to individuals with disabilities. Students who have a disability and need specific accommodations and supports to facilitate full inclusion of all aspects of the course should make an appointment with the instructor the first week of the term. To register for services, students may go to Disability Services, located in Clark Howell Hall (706-542-8719, TTY 706-542-8778, www.dissvcs.uga.edu).

POLICY ON ACADEMIC MISCONDUCT

In keeping with the academic honesty policy of the University of Georgia, all participants in this course are expected to be academically honest in all their work and not tolerate academic dishonesty of others. Academic honesty means performing all work without plagiarism, cheating, lying, tampering, stealing, receiving unauthorized or illegitimate assistance from any other person, or using any source of information that is not common knowledge. Academic dishonesty means knowingly performing, attempting to perform, or assisting any other person in performing academic work that does not meet this standard. A full statement of the policy is available online at www.uga.edu/ovpi/academic_honesty/culture_honesty.htm.

Laptop Policy

You are welcome to bring your laptop to class. I do ask, however, that you use it only for note taking. Please do not use it to check or send emails, chats, or other entertainment.

Course OUTLINE

Aug 19	Introduction. Course content overview
Aug 26	<p>Introduction to the field of nonprofit organizations. Create teams</p> <p>Readings:</p> <ul style="list-style-type: none"> • Holland & Ritvo, Chapter 1. <i>Nonprofit Organizations Today</i>. • Salamon, L.M. (2003). <i>The Resilient Sector</i>. Washington, D.C • National Center for Nonprofit Boards and Independent Sector, <i>What You Should Know About Nonprofits</i>.
Sept 2	<p>History of the Nonprofit Sector and Ethical Issues facing Nonprofits</p> <p>Readings:</p> <ul style="list-style-type: none"> • Holland & Ritvo, Chapter 2: <i>History and Theories of Nonprofit Organizations in the U.S.</i> • Holland & Ritvo, Chapter 3: <i>Ethical Issues in Nonprofit Organizations</i>. • Meneghetti, M. M., & Seel, K. <i>Ethics and Values in the Nonprofit Organization</i>. • Analyze the case, "Pat Barga's Discovery." <p><u>Team assignment:</u> Choose one nonprofit and prepare a two-minute elevator speech about it to share with class. Additionally, prepare a one-page concept paper about YOUR nonprofit. Plan to share your ideas with the class.</p>
Sept 9	<p>Legal and Tax Regulation of Nonprofit Organizations</p> <p>Readings:</p> <ul style="list-style-type: none"> • Holland & Ritvo, Chapter 4: <i>Creating an Effective Nonprofit Organization</i>. • Willbur, R. (2000). <i>Knowing Important Legal Requirements</i>. • Kettner, Moroney, & Martin (2008). <i>Needs Assessment: Theoretical considerations</i>. • Kettner, Moroney, & Martin (2008). <i>Needs Assessment: Approaches to Measurement</i>. • www.irs.gov On the IRS home page, click on "charities and nonprofits." Then click on "Forms and publications." Then click on "publication number," and scroll down to # 557, "Tax Exempt Status for Your Organization." <p><u>Team assignment:</u> Bring a copy of existing articles of incorporation and bylaws to the class.</p>
Sept 16	<p>Program Design. Mission and vision. Setting goals and objectives</p> <p>Readings:</p> <ul style="list-style-type: none"> • Kiritz, N. J. <i>Program Planning and Proposal Writing</i>. • Kettner, Moroney, & Martin (2008). <i>Selecting the Appropriate Intervention Strategy</i>. • Kettner, Moroney, & Martin (2008). <i>Setting Goals and Objectives</i>. • Allison, M., & Kaye, J. (1997). <i>Defining your Challenge</i>. <p><u>Team assignment:</u> 1) Research mission statements and bring in 3-5 statements from nonprofits similar to your organization. 2) Obtain a copy of goals and objectives of a nonprofit organization of your choice.</p>

Sept 23	<p>Strategic Planning</p> <p>Readings:</p> <ul style="list-style-type: none"> • Holland & Ritvo, Chapter 10, <i>Designing and Implementing a Strategic Plan</i>. • Austin, M. J., & Solomon, J. R. (2001). <i>Managing the Planning Process</i>. • <i>Appendix A and B: Strategic Planning Worksheets and Strategic Plan Outline</i>. <p>Nonprofit Development Assignment 1 Due: Needs assessment paper</p> <p><u>Team assignment:</u> Obtain a copy of an <u>existing</u> strategic plan and bring it to the class.</p> <p><i>Teams: Come prepared to share your nonprofit organization's mission statement, goals, and objectives with the class. Start working on bylaws.</i></p>
Sept 30	<p>Theoretical Frameworks for Understanding Organizations and Issues of Leadership and Management</p> <p>Readings:</p> <ul style="list-style-type: none"> • Holland & Ritvo, Chapter 5: <i>Understanding Organizations</i> • Holland & Ritvo, Chapter 6: <i>Leading and Managing in Nonprofit Organizations</i> • Pearce, C. L., Perry, M. L., & Sims, H. P. (2000). <i>Shared Leadership: Relationship Management to Improve Nonprofit Organization Effectiveness</i>. <p>Nonprofit Development Assignment 2 Due: Description of your nonprofit. Mission, vision, goals, objectives.</p> <p><i>Teams: Submit your nonprofit's bylaws for review and class discussion.</i></p>
Oct 7	<p>Managing Human Resources</p> <p>Readings:</p> <ul style="list-style-type: none"> • Holland & Ritvo, Chapter 7: <i>Key Issues in Human Resources</i>. • Pecora, P. (1998). <i>Recruiting and selecting effective employees</i>. • Bradner, J. H. (2001). <i>Volunteer management</i>. <p><u>Team assignment:</u> Obtain an <u>existing</u> statement of the board's duties or a job description for its members and bring it to the class.</p> <p><i>Teams: Bring a draft of your nonprofit organization's strategic plan for review and possible class discussion.</i></p>
Oct 14	<p>Effective Governance of Nonprofit Organizations</p> <p>Readings:</p> <ul style="list-style-type: none"> • Holland & Ritvo, Chapter 8: <i>Governing Effectively</i>. • Hulton & Phillips (2001). <i>Building your Board of Directors</i>. • Taylor, B.E., Chait, R.P. & Holland, T.P. (1996). <i>The New Work of the Nonprofit Board</i>. <p>Nonprofit Development Assignment 3 due: Strategic plan</p> <p><i>Teams: Bring a draft of YOUR human resource paper for review and possible class discussion.</i></p>

Oct 21	<p>Marketing and Fundraising.</p> <ul style="list-style-type: none"> • Holland & Ritvo, Chapter 11: <i>Community Relations</i>. • Wilbur, E. (2000). <i>Creating a Marketing Orientation in the Nonprofit Organization</i>. • Holland & Ritvo, Chapter 12: <i>Principles and Practices of Effective Fundraising</i>. • Hulton & Phillips (2001). <i>Crafting a Fundraising Plan</i>. • www.NonprofitPR.com A new website that offers a variety of materials intended to assist nonprofit organizations to develop better public relations efforts. <p><u>Team assignments:</u> 1) Obtain marketing materials for two organizations of your choice and bring them to the class 2) Obtain at least two case statements and bring them to the class.</p>
Oct 28	<p>Financial Accountability.</p> <ul style="list-style-type: none"> • Holland & Ritvo, Chapter 15: <i>Financial Accountability</i>. • Stevens, S. K. <i>Measuring Financial Health</i>. Foundation News and Commentary. • Hutton, S., & Phillips, F. (2001). <i>Showing the money: Budgets and financial reports</i>. • Reynolds, R. G. (2001). <i>Budgeting considerations</i>. <p>Nonprofit Development Assignment 4 due: Human resource paper.</p> <p><u>Team assignment:</u> Ask the executive director of a nonprofit organization to share its budget and bring a copy to the class.</p>
Nov 4	<p>Management of Information systems. New Information technology.</p> <ul style="list-style-type: none"> • Kettner, Moroney, & Martin. <i>Building a management information system</i>. • Zimmerman, L. I., & Broughton, A. (1998). <i>Assessing, planning, and managing information technology</i>. • Stein, M. (2005). <i>Nonprofit success on the internet: Creating an effective online presence</i>. <p><u>Team assignment:</u> Review at least three nonprofit organizations' websites. Come to the class prepared to provide examples of a well designed and a poorly designed website.</p> <p><i>Teams: Bring a draft of your nonprofit organization's marketing and fundraising paper for review and possible class discussion.</i></p>
Nov 11	<p>Organizational Change. The Future for Nonprofit Organizations.</p> <p>Readings:</p> <ul style="list-style-type: none"> • Holland and Ritvo, Chapter 9: <i>Organizational Growth and Renewal</i>. • Holland & Ritvo, Chapter 16: <i>Nonprofit Organizations Tomorrow</i>. • Massarsky, C. W. (2005). <i>Enterprise strategies for generating revenue</i>. • Power, E. (2000). <i>Coping with Change: A Primer for Developing Human Resources</i>. <p>Nonprofit Development Assignment 5 due: Marketing and Fundraising paper</p>

Nov 18	<p>Assessment, Evaluation, and Accountability</p> <p>Read:</p> <ul style="list-style-type: none"> • Holland & Ritvo, Chapter 13: <i>Program Evaluation</i>. • Holland & Ritvo, Chapter 14: <i>Public and Private Accountability for Nonprofits</i>. • Thomas, J. C. (2005). <i>Outcome Assessment and Program Evaluation</i>. <p><i>Teams: Bring a draft of your budget for review and possible class discussion.</i></p>
Nov 25	<p>Team presentations</p> <p>Nonprofit Development Assignment 6 due: Budget</p>
Dec 2	Team presentations

SUGGESTED READINGS

Suggested readings for going further on strategic planning:

Allison, M. & Kaye, J. (1997). *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*. New York: Wiley

Bryson, J.M. (1996). *Strategic Planning for Public and Nonprofit Organizations*. San Francisco: Jossey-Bass.

Bryson, J.M. & Alston, F.K. (1996). *Creating and Implementing your Strategic Plan: Workbook for Public and Nonprofit Organizations*. San Francisco: Jossey-Bass.

Burkhart, P.J. & Reuss, S. (1993). *Successful Strategic Planning: A Guide for Nonprofit Organizations*. Newbury Park, Calif.: Sage.

Migliore, R.H., Stevens, R.E., Loudon, D.L., & Williamson, S. (1995). *Strategic Planning for Not-for-Profit Organizations*. New York: Haworth Press.

Suggestions for going further on development of human resources:

Bowin, D.H. (1996). *Human resource management: An experiential approach*. N.J.: Prentice Hall.

Brudney, J.L. (1992). Administrators of volunteer services: Their needs for training and research. *Nonprofit Management and Leadership* (2), p. 271-282.

Brudney, J.L. (1995). Preparing the organization for volunteers. In T.D. Connors (Ed.) *The Volunteer Management Handbook*. New York: Wiley, pp. 36-60.

Brudney, J.L. (1994). Designing and managing volunteer programs. In R.D. Herman (Ed.) *The Jossey-Bass Handbook of Nonprofit Leadership and Management*. San Francisco: Jossey-Bass, pp. 279-302.

Chait, R.P., Holland, T.P., & Taylor, B.E. (1996). *Improving the performance of governing boards*. New York: Greenwood.

Cowling, A.G. & Lundy, O. (1996). *Strategic human resource management*. New York: Routledge.

Fine, M.G. (1995). Building successful multicultural organizations. Westport, Conn.: Quorum Books

Hersey, P. & Blanchard, K. (1992). *Management of organizational behavior: Utilizing human resources*. Englewood Cliffs, NJ: Prentice-Hall.

Holland, T.P. (1996). *How to Build a More Effective Board*. Washington, D.C.: National Center for Nonprofit Boards.

Kempton, J. (1995). *Human resources management and development*. New York: St. Martin=s Press.

Suggested readings for going further on marketing and fund raising:

Booth, M. (1991). *Promoting Issues and Ideas: A Guide to Public Relations for Nonprofit Organizations*. New York: Foundation Center.

Edwards, R.L. & Benefield, E.A.S. (1997). *Building a Strong Foundation: Fundraising for Nonprofits*. Washington, D.C.: N.A.S.W. Press.

Greenfield, J.M. (2001). *The Nonprofit Handbook: Fundraising* (third edition). New York: Wiley

Howe, F. (1991). *The Board Member=s Guide to Fund Raising*. San Francisco: Jossey Bass.

Kotler, Philip. (1992). *Marketing for non-profit organizations*. Englewood Cliffs, NJ: Prentice-Hall (Georgia Center).

Kiritz, Norman, J. (1979). Program planning and proposal writing. *Grantsmanship Center News*, pp. 33-79.

Public Interest Public Relations (1997). *Promoting Issues and Ideas: A Guide to Public Relations for Nonprofit Organizations*. New York: The Foundation Center.

Schaff, T.D. (1999). *The Fundraising Planner: A Working Model for Raising the Dollars You Need*. San Francisco: Jossey Bass.

Suggested readings for going further on managing financial resources:

Bryce, H.J. (1997). *Financial and Strategic Management for Nonprofit Organizations*. Englewood Cliffs, N.Y., Prentice-Hall.

Gross, M.J. (1995). *Financial and Accounting Guide for Nonprofit Organizations*. New York: Wiley.

Herslinger, R.E. & Nitterhouse, D. (1995). *Financial Accounting and Managerial Control for Nonprofit Organizations*. Cincinnati: SouthWestern Publishing Co.

Wilcox, K. A. & San Miguel, J. G. (1990). *Introduction to financial accounting*. New York: Harper and Row.