Syllabus Appendix: Service Learning Assignment

S362
NONPROFIT MANAGEMENT AND LEADERSHIP

Fall 2011, Section 11102 (Honors)
Tuesday/Thursday 9:30-10:45 a.m.
SPEA 275

Professor: Beth Gazley
Phone: 855-1464
E-mail: bgazley@indiana.edu
Office / Secretary: SPEA 410C / Melissa Yahne

Office Hours: I don't hold formal office hours because it's easy to reach me. I am usually available before and after class and free daily for some time between 8-5. Appointments are strongly preferred over drop-ins (just phone ahead and tell me you're coming in).

I. COURSE DESCRIPTION

The nonprofit sector in the United States contains close to two million organizations and is growing rapidly. An estimated 10% of the American workforce is employed in the nonprofit sector, and one in three individuals volunteers somewhere. 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 through your lifetime.

This survey course will provide you with an overview of nonprofit law and managerial operations. The course begins with the legal structure for 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 learning to give students daily opportunities to test their textbook material in the real world.

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
- Opportunity for direct experience in a service-learning project
- Experience in analyzing management dilemmas and proposing responses

II. REQUIRED READING

Texts:

Michael J. Worth, Nonprofit Management: Principles and Practice, Second Edition. Sage, 2012, ISBN 978-1-4129-9445-3 (BE SURE TO ORDER THE SECOND EDITION)

Bruce Hopkins, Starting and Managing a Nonprofit Organization, 5th Edition (BE SURE TO ORDER THE FIFTH EDITION). 2009, Wiley, ISBN 978-0-470-39793-0

These books are sold locally only through Boxcar Books, and not at the campus bookstore. The address is 408 East Sixth Street, next to Runcible Spoon. Boxcar is a nonprofit bookstore. The books might be available through Amazon.

Online material:

Web-based resources as indicated in the syllabus. All reading will either be posted at the OnCourse "Resources" link under "reading assignments" or the URL will be provided in the syllabus.

Also see the long list of web-based resources I have posted at the end of this syllabus.

III. COURSE ACTIVITIES / REQUIREMENTS

A. Summary of Course Requirements:

(1) Daily attendance, completion of all reading assignments, completion of service learning assignments, and contributions to class discussion (20%)

(2) Two unit tests (40%)

(3) Five high quality issue briefs/reading responses (40%). Note that TWO of these papers should be written by 10/11, to ensure you're prepared for topics that the first test will cover.

B. Expectations of students:

Read this: http://www.usnews.com/blogs/professors-guide/2009/02/25/9-ways-to-get-on-your-professors-bad-side.html

Communication:

Complicated requests are most effectively handled by a phone call or visit rather than email.

Reading assignments are posted in OnCourse at http://oncourse.iu.edu/Default.asp?action=login . You can also use OnCourse for email, but I prefer direct contact at bgazley@indiana.edu. I don't use OnCourse for posting grades; please keep track of your own progress.

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

Academic Integrity:

Feel free to see me with any questions about what constitutes plagiarism or how to avoid it. Penalties I have applied in the past have included warnings filed with student records, grade deductions, and a course grade of F for serious breaches. These are useful sites: http://dsa.indiana.edu/Code (Section III: Student Misconduct), http://sja.ucdavis.edu/avoid.htm and http://www.education.indiana.edu/~frick/plagiarism/

C. Course Requirements:

1. Participation, Attendance and Service Learning Activity (20%)

Participation and Attendance

Not surprisingly, you will find that active engagement of the course material is a better way to learn than passive listening. You must have the reading completed before the class at which it is discussed. You will sometimes discuss the readings in small groups. Please be prepared.

I will take attendance in this class. Your participation grade will be based on the percentage of classes you have attended, the reading you did and the extent to which you have verbally engaged the material. The only way to get a 100 in participation is to combine excellent attendance with excellent class participation.

Please observe professional demeanor consistent with SPEA's student code of conduct while in class. This includes avoiding disruptive late arrivals and early departures, web surfing, side conversations, sleeping, or doing Sudoku. Food is fine; just carry out what you bring in.

If you miss class, contact your fellow students for the notes. All assignments must be submitted on their due dates. Make-ups (scheduled at my discretion) and extensions are possible only for the tests, and then only for an excused absence. I define an excused absence as a documented personal illness (with doctor's note), a documented family emergency or a documented official university obligation. Prompt documentation is your responsibility.

Service learning assignment

A central part of this course is an applied, community based project working for a real client on a real task. You will have 3-4 projects to choose from, and all students must work on a project (no exceptions). For more information on the project and deliverables, see the other handout ("Syllabus appendix: Service Learning Assignment" and "Project Options").

2. Tests (2 x 20 points each = 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 will include multiple choice, true/false, term definition, and essays.

Answers to tests will be graded on (1) accuracy, and (2) ability to incorporate material from a <u>variety</u> of sources, including your assigned readings, service learning project experience, and lecture notes. Essay questions on the tests will be drawn from the discussion material in the course material labeled "class discussion". To do well on these tests, you should be prepared to incorporate all textbook chapters, class discussion, experiential learning, and lecture notes and slides. Do not rely exclusively on powerpoints and lecture notes for these tests – they are designed to rely on your comprehensive knowledge of the material.

2. Issue Briefs/Reading Responses (5 x 8 points each = 40% of course grade)

Topics and deadlines

In the syllabus, see the questions that follow each class unit, under "Reading Response". Your assignment is to produce a response to these questions organized as issue briefs to a board. In most cases, these work best when they are written as a formal memorandum to a board of directors or the executive staff of a nonprofit organization (think of a board/staff as your audience rather than me). You will complete five out of 14 opportunities. <u>**These are due in class, in hard copy, on the same day the topic will be discussed**</u>. I will always accept papers early, but not late.

Audience and application

Your audience can be hypothetical or real. Use your own employment, other service-learning projects, internships or volunteer activities to frame your memos in the context of a real organization's operations whenever possible. If you prefer to use fictional situations, just make it up ("let's assume…") but keep it realistic.

If you are working/volunteering with an agency aside from your service learning project, I strongly recommend that you discuss topics with your supervisor beforehand and select those that s/he will find useful. Since part of my expectation of you is that your recommendations be realistic and relevant, I will grade (favorably) those memos in which you have taken the initiative to get feedback from your agency contacts before submitting the final memo to me. Many past students of mine use their best issue briefs as a writing sample to get a job.

Readings

I will expect you to draw on all of the assigned readings for that course topic, **plus** any additional readings that you find necessary. If the assigned readings do not address an issue that you raise or find relevant in your discussion, I expect you to seek additional resources. Please cite carefully and properly. I require in-text citations and a full bibliography for all work (preferably MLA, Chicago or APA style).

Length and grading criteria

Each memo or paper should be a <u>minimum of three pages of text, not including bibliography, single-spaced with double spaces between paragraphs (the same format as this syllabus), in 12-pt font.</u> The memos should be of very high professional quality, carefully edited and proofread, and ready to send to a board of directors. Presentation matters, but writing quality matters more. Subheadings and internal organization are always welcome. The maximum length is up to you, but keep your professional audience in mind, and edit carefully and thoroughly. To be honest, I tend to grade favorably longer reading responses because they signal that you did more work, but it's also important to observe that length ≠ quality.

Getting help from me

Continual support for student learning is a big part of my professional ethics, and that includes support during paper development. You will find me very accessible provided you plan ahead. You are welcome to make an appointment in person with me to discuss a paper idea, rough draft, nearly finished product, or recently graded paper. I will be happy to help you understand what can be done to make it A-quality. Please note that sending me drafts to evaluate via email is not effective.

In all grading, I give equal weight to three qualities:

1. **Quality of analysis**: Thoroughness with which you answer the questions, including quality (clarity, accuracy, comprehensiveness and thoughtfulness) of your analysis, and relevance and appropriateness of your recommendations for the particular nonprofit or situation.

2. **Quality and quantity of the research**, including extent to which you have made use of available reading material.

3. **Quality of the writing**: proofread, edited, correct use of grammar, syntax and punctuation. Note that I need a bibliography with sources, and also need in-text citations. I put a lot of emphasis on professional writing and readiness in this class, so expect EVERY paper to be clean, polished, and something you would be proud to attach to a job application.

For <u>all</u> students and <u>all</u> written assignments, please follow the following guidelines:

- All papers should be **single**-spaced, in 12-point font, using 1-page margins.
- 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. <u>Do</u> produce a high-quality, carefully edited paper that reflects thoughtful work. I will be available any time you need me during the semester to meet with you to discuss content, react to ideas, and offer suggestions.
- I have available in my office samples of past student work. You are welcome to look at these.

My expectations for your 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 – <u>I require in-text citation</u>.
- 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 your professor or the TA.
- 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).

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.

Grading scale: The following grading scale will be used for assignments and final grades:

97 - 100% = A+	87 - 89% = B+	77 - 79% = C+	67 - 69% = D+
93 - 96% = A	83 - 86% = B	73 - 76% = C	63 - 66% = D
90 - 92% = A-	80 - 82% = B-	70 - 72% = C-	60 - 62% = D-

Below 60% = Failing

V. COURSE SCHEDULE AND ACTIVITIES

SECTION ONE: INTRODUCTION TO NONPROFIT MANAGEMENT

Tues. 8/30 **Introduction and Purpose of Course**

Syllabus review
Knowledge quiz and discussion

Thur. 9/1 **Discussion of service learning projects,**
Overview of the nonprofit sector

Reading assignments: Worth, Chapters 1 and 2, and Hopkins, Chapters 1 and 3

Class discussion: You will quickly learn from me that EVERYTHING related to management is contextual. What works for one organization may or may not work for another. We'll start on the right foot by discussing the political environment for NPM right now. What's occupying the attention of NPO managers? What demographic, social and fiscal changes are happening, and what can we learn to prepare for them?

Tues. 9/6 **How to Incorporate and other Legal Issues**

Reading Assignments**:** Hopkins, Chapters 2, 4, and 6

Read "How to Start a Nonprofit" at
http://www.councilofnonprofits.org/?q=howtostartanonprofit

IRS Forms, see http://www.irs.gov Link: "Charities & Nonprofits" →
Resources: "Forms and Documents," look at Publication 557 and Forms 1023, 990

Indiana Guide to Nonprofit Incorporation (OnCourse)

Helpful supplemental reading if you're doing the reading response:

"Keeping the IRS Happy" at http://form1023help.com/

Indiana state resources at: http://www.in.gov/sos/business/2426.htm and
http://www.in.gov/dor/3506.htm

Reading Response #1 (and class discussion): Incorporation

Your real/hypothetical organization has not incorporated yet, and asks you to describe the process and its major steps. Outline the incorporation process for an Indiana nonprofit, paying especial attention to the role of state agencies vis a vis the Internal Revenue Service, and also to the "organizational" and "operational" tests. Answer as many of these questions as you can:

- Why incorporate at all? What are the advantages and disadvantages?
- What is the incorporation process and major steps?
- What are the respective roles of the state and federal government?
- What are the most important decision points? What does an organization have to know/decide before it even begins to fill out the Form 1023?
- What happens next -- How will your application for recognition be addressed?
- What's the difference between the operational and organizational "tests" and how should your organization be prepared to address them?

Thu. 9/8 Mission development in NPOs

Reading Assignment: Chapter 3: Defining Organizational Purpose in Migliore's "Strategic Planning for NPOs" (posted as a pdf in OnCourse)

Class discussion and Reading Response #2: Migliore outlines basic elements covered in a mission statement and a statement of purpose. Before class, locate a nonprofit organization's mission statement and analyze it according to Migliore's criteria. Come prepared to discuss the mission statement. To what extent has this organization followed Migliore's outline? And if a different approach is taken, to what extent does it succeed? Should every organization follow Migliore's approach, or does it all depend?

Second half of class will be open team meeting time to get started on your service learning projects. Andrew Libby will be coming over to meet with his team at 10:15.

SECTION TWO: LEADING AND MANAGING NONPROFITS

Tues. 9/13 Governance and Leadership: The Board of Directors

Reading Assignments**:** Worth, Chapter 3; Hopkins, Chapters 5 and 8

"Chapter Two: Working Together" (pages 27-54) in Smith, Bucklin, *The Complete Guide to Nonprofit Management* – Posted as a pdf attachment in OnCourse

Class discussion and Reading Response #3: Write a memo explaining to a board of directors the most important responsibilities and qualities of a nonprofit board. In your memo, try to distinguish between what is REQUIRED by law of boards according to Hopkins, Smith/Bucklin, and Worth, and what is merely DESIRABLE.

Thu. 9/15 **Governance and Leadership: Executive Directors**

Reading Assignment**:** Worth, Chapter 4

Class discussion: The textbook asks the question, "who leads in a nonprofit organization?" We will discuss some of the ways in which this question can be answered, paying especial attention to ways in which the roles of the board and CEO can be defined.

Tues. 9/20 **Governance and Leadership: Case Study**

Reading Assignment: Case Study**:** Leslie, D. et al. "Living With Complexity: The Lincoln Hill Experience," in *Stories from the Board Room* (1994) Available in OnCourse

Everyone come prepared to discuss these questions: What weaknesses and strengths were exhibited by the Lincoln Hill Board and Executive Director in the course of this story? In what ways are they managing themselves better at the end of the story compared to the beginning? What next steps might you advise the Board and Executive Director to take to further their development and effectiveness? Why? Be sure to defend your answers.

Reading Response #4: Write an analysis of the Lincoln Hill case with the goal of helping another board avoid the same mistakes. Use the questions above as your general guide, but feel free to incorporate any of the other questions posed within the case study. There is more than one good way to approach this memo – you can analyze the board's strengths and weaknesses using a SWOT approach, or you can put the emphasis on board development and training, or you can make LH a cautionary tale for your own board. Be creative.

Thu. 9/22 **Service learning project time and**

North/South/East/West: An exercise in understanding team dynamics

We will do an experiential exercise that helps you understand how people work differently in team-based work environments. This exercise is useful to students working in service-learning teams, but it has general applications to nonprofit management as well. Understanding how to work effectively in teams is a useful professional skill.

Tues. 9/27 **Guest speaker: Danielle McClelland, Executive Director, Buskirk-Chumley Theatre**

Thu. 9/29 **Human Resources Management in NPOs**

Reading Assignments**:** **"**Chapter 13: Your People and Their Environment" (pages 309-325) in Smith, Bucklin, *The Complete Guide to Nonprofit Management* – Posted as a pdf attachment in OnCourse

Worth, Chapter 8

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

Class discussion: In this unit, we will have fun exploring (and exploding) some myths about the nonprofit labor force, including "you can't make a living working in the nonprofit sector" and other things your parents tell you….

Tues. 10/4 **Volunteer Motivation and Management**

Class discussion: Are volunteers motivated and managed the same way as paid staff? What's the same and what is different about the way we need to approach the effective recruitment, training, involvement, recognition, evaluation and retention of volunteer labor?

Reading Response #5: Answer the questions above in writing. You can use Worth and Smith/Bucklin as your primary sources, but you may find it helpful to do some additional research. Look especially for work by Brudney and Ellis.

Thu. 10/6 **Valuing Volunteer Time (Class exercise)**

Goulbourne, Michelle and Embuldeniya, Don. (2002). Assigning economic value to volunteer activity. Canadian Centre for Philanthropy. (In Oncourse)

The Value of Volunteer Time.
http://www.independentsector.org/programs/research/volunteer_time.html

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

Class discussion: Read these resources to compare the ways that volunteer contributions are 'valued' in dollar terms. Through a class exercise, we will explore the ways that financial value is attached to volunteer labor. Be prepared to form an opinion on the approaches that seem most valid. It also helps to think about whether any NPO you know could accomplish these valuing methods.

Reading Response #6: Assume your nonprofit organization uses the Independent Sector method of valuing volunteer time. Write a memo to staff/board making an argument for a more sophisticated or comprehensive method of understanding what financial, strategic and programmatic value volunteers bring to your programs. This memo should compare and contrast some of the methods I had you read about, but you don't have to evaluate them all. Just choose a method or two and make a good argument about why it's worth adopting. Be sure to explain the pros and cons of any position you take, since some of these methods might require additional data collection or record-keeping.

Tues. 10/11 Guest speaker: Kevan Lawlor, CEO NSF International (http://www.nsf.org/)

Thu. 10/13 Test review, service-learning project time

Tues. 10/18 Test #1

Thu. 10/20 Fundraising

Reading Assignments**:** Worth, Chapter 10

"Chapter Five: Raising Money to Serve Your Cause" (pages 97-122) in Smith, Bucklin, *The Complete Guide to Nonprofit Management* – Posted as a pdf attachment in OnCourse

Supplementary reading (if you're interested): Hopkins, Chapters 11 and 12

Reading Response #7: Most people get anxious about fundraising, despite its importance to NPOs. What suggestions do you get from Worth, Smith and Bucklin that help make successful fundraising look more achievable?

Tues. 10/25 Marketing and Communications

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

Worth, Chapter 9

Class discussion: 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?

Thu. 10/27 Collaborations, Mergers, Partnerships and Joint Ventures

Reading Assignments: Worth, Chapter 13 and Hopkins, Chapter 18

Reading Response #8: What are the benefits and opportunities of inter-organizational collaboration? Is there a list of necessary ingredients for an effective partnership? Is collaboration a win-win for all, or are there challenges we need to look out for

Tues. 11/1 **The 990: Dissecting a Nonprofit "Tax Return"**

Hopkins, Chapters 9 and 10

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

Also go to IRS website at http://www.irs.gov/charities/article/0,,id=176613,00.html to look at the new 990 form, implemented since 2009.

Class discussion and Reading Response #9: 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? What are the public benefits of the new 990? Do the benefits outweigh any additional reporting burden?

Thu. 11/3 **Commercialism and Enterprise**

Reading Assignment**:** Worth, Chapter 11 and Hopkins, Chapter 12

Class discussion and Reading Response #10: What does "keeping it 'related'" mean and why is this important to a NPO? How can organizations increase earned income with a minimal impact on taxes? What should NPO managers know about UBIT?

Tues. 11/8 **Political Advocacy: Nonprofit Rights and Obligations**

Reading assignments: Hopkins, Chapter 14 and 15; Worth, Chapter 14

Supplemental reading if you're interested or doing the reading response:
http://www.clpi.org and click on "The Law" link
http://www.irs.gov/newsroom/article/0,,id=154712,00.html
http://www.independentsector.org/programs/gr/lobbyguide.html

Class discussion: We will define nonprofit political advocacy, nonprofit lobbying and political campaign intervention (AKA 'electioneering') and understand 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). We will also discuss how an organization can engage in political activity, how to do it legally, and whether it makes sense for an organization to take the 501-h election.

Reading Response #11: Pretend you work for a c-3 charity where the board wants to take a position on political issues in elections and also when the state budget is voted on. Explain to your board how to do it legally, beginning with the difference between advocacy, lobbying and electioneering. What can a c-3 do? How would a change of tax status to a c-4 or other form alter what your nonprofit can or cannot do? Note: Be very specific and accurate in discussing differences in tax status, rights and restrictions. Your organization's exempt status may depend on it.

Thu. 11/10 **Test #2 (administered by my assistant, Melissa Yahne)**

Tues. 11/15 **Strategic Planning**

Reading Assignments: Worth, Chapter 7

"Chapter One: Establishing the Organization's Direction," (pages 3-26) in Smith, Bucklin, *The Complete Guide to Nonprofit Management* – Posted as a pdf attachment in OnCourse

Class discussion will focus on the key steps to strategic planning described in these readings and the commonalities in the strategic planning approaches recommended by Worth and S/B.

Thu. 11/17 Service learning project time (schedule on your own; I'll be at conference)

SECTION THREE: MANAGERIAL CHALLENGES

Tues. 11/22 **Accountability, Evaluation and Organizational Effectiveness**

Reading Assignment**:** Worth, Chapters 5 and 6

"Chapter 3: Anatomy of a Dysfunctional Nonprofit" (pages 49-65) in Sarbanes-Oxley and Nonprofit Management (Jackson and Fogarty), available in OnCourse.

Class discussion and Reading Response #12: 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. 11/24 **Happy Thanksgiving!**

Tues. 11/29 **Case Study and Group Discussion, Accountability at the Red Cross**

Readings: Gazley, "9/11, Tsunamis and Katrina: The American Red Cross and Accountability" (Available on OnCourse)

American National Red Cross at www.redcross.org

Sontag, S. 2002. Who brought Bernadine Healy down? (OnCourse)

Come prepared to discuss the questions posed in the case study

Thu. 12/1 **Class discussion, Independent Sector "Principles for Good Governance"**

These can be found at http://www.nonprofitpanel.org/ and http://www.nonprofitpanel.org/report/principles/Principles_Guide.pdf

*** Be sure to bring a copy to class. ***

Class discussion and Reading Response #13: Identify 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?

Tues. 12/6 **Nonprofit Ethics**

Read: "How Ethical is Your Nonprofit?" at http://www.guidestar.org/news/features/ethics.jsp and

Independent Sector's Model Code of Ethics at http://www.independentsector.org/media/code_ethicspr2.html

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

Reading Response #14: 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 Independent Sector? Why or why not should they?

Thu. 12/8 **Student presentations on service learning projects.**

Have a great winter break!

****

Resources (and feel free to come browse my bookshelf too):

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-EFB6-4036-8498D5414328FD73/111/262/

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
http://www.standardsforexcellenceinstitute.org/public/html/find_b.html
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 listserve for the semester.
- http://www.ombwatch.org/npadv Covers nonprofit advocacy

Strategic Planning

Barry, Bryan. 1997. *Strategic Planning Workbook for Nonprofit Organizations*. Amherst Wilder Foundation.

Allison, Michael and Kaye, Jude. 1997. *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook.* John Wiley & Sons. (Note: Emphasis on SWOT analysis).

Howe, Fisher. 1997. *The Board Member's Guide to Strategic Planning*. Jossey-Bass.

Nonprofit Political Activity

Background on public law for 501-c-4s and 527 regarding issue advocacy and electioneering
http://electionlawblog.org/archives/aprill.pdf and 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
http://www.afj.org/for-nonprofits-foundations/resources-and-publications/free-resources/worry-free-lobbying-for-1.html

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
http://www.idealist.org/if/idealist/en/FAQ/QuestionViewer/default?section=16&item=34

Permissable 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://www.eridlc.com/index.cfm?fuseaction=textbook.chpt11

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

http://www.careerjournal.com/salaryhiring/industries/nonprofits/index.html

http://www.nptimes.com/

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

salary.com, monster.com, careerbuilders.com

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

Volunteer Management

Goulbourne, Michelle and Embuldeniya, Don. (2002). Assigning economic value to volunteer activity. Canadian Centre for Philanthropy. http://studentemploymentcenter.dal.ca/images/volunteer/econvalu.pdf

The Value of Volunteer Time. http://www.independentsector.org/programs/research/volunteer_time.html

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

UPDATED WITH TEAM ASSIGNMENTS

Task: Students will work together in four to six-person teams for the entire semester directly with a local nonprofit organization or other client on a volunteer activity relevant to nonprofit management, broadly defined. Each student should plan to schedule two to four hours per week on this assignment.

Deliverables: I expect three things from you: (1) A happy client, who can report back to me that the tasks were accomplished. (2) A joint student presentation scheduled for Dec. 8 (last day of classes) on your project. We will talk more in class about the format, but we're roughly looking at 20 minutes on what you accomplished and learned, using handouts and/or powerpoint, well organized, scripted and rehearsed. The client will be invited to attend the presentation. (3) Evidence that you can take what you're learning and incorporate it into your other paper assignment and test material. In other words, this is great raw material about the nonprofit sector and I expect you to apply what you're learning and doing to other class assignments.

Choosing the project: You will choose from 3-4 project options distributed on the first day of classes. You should choose a first and second choice by the second day of classes. I will make assignments by Tuesday 9/6. Work should begin immediately.

The client's expectations: You are there as volunteers, as students, and as nonprofit management resources . Agency staff will be spending some 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 should be on time for meetings and observe a professional demeanor.

Your expectations of one another. No free riders. I strongly suggest that your team put together and sign a one-page "memo of agreement" with your client and among yourselves that describes what you plan to accomplish, the deliverables, and what you need from them in the way of regular meeting times, communication, etc. Be sure everyone understands this is a semester-long project and you have deadlines. This will benefit your client by allowing them to plan ahead on meeting your needs, and will benefit you as well.

Who does what? The work should be equally divided, 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. Note again that work should be EQUALLY DIVIDED.

Getting help from the instructor: Team-based work can pose challenges. I am available as a resource throughout the semester. Waiting too long ask me for help is NOT good. You will be given limited in-class time to meet with your team. I require the team to meet with me or the teaching assistant at least once as a full team during the semester. All team members are expected to be present at these meetings.

Grading: I reserve the right to administer a peer evaluation form that will ask you to rate the contributions of your teammates and that will be counted toward your final grade. I will use the peer evaluation only if I see evidence that some students are letting down their teammates.

Service Learning Project Options – Fall 2011 S362 Gazley

UPDATED WITH TEAM ASSIGNMENTS

1. Bloomington Volunteer Network (Tegan McQuaid, Whitney Switzer, Hayley Trezzo)

Elizabeth ("Bet") Savich, Director
City of Bloomington Volunteer Network
401 N. Morton Street, Suite 260
PO Box 100
Bloomington IN 47402
812-349-3472
fax: 812-349-3483
volunteer@bloomington.in.gov
savichb@bloomington.in.gov
www.bloomington.in.gov/volunteer
Facebook: http://www.facebook.com/pages/City-of-Bloomington-Volunteer-Network/56202931201?ref=ts

Lucy Schaich
p. 349-3433
schaichl@bloomington.in.gov

The Bloomington Volunteer Network is a program of the City of Bloomington that connects individuals and groups to volunteer opportunities in Monroe County, builds the capacity for effective volunteering through nonprofit resources and professional training, promotes and celebrates volunteerism through events such as the Be More Awards (which SPEA students have won!), and helps to build strategic partnerships. More at www.bloomington.in.gov/volunteer. The BVN has fielded a short survey to assess the level of volunteer involvement in its affiliated organizations. They need a team of four students to analyze the data (with Prof. Gazley's help), and produce a summary report augmented with background research and a literature review to help the BVN connect the findings from the survey to volunteer engagement best practices.

Learning opportunities: This project will be a good match for students interested in volunteerism, surveying and data analysis. The survey will include all kinds of organizations (arts, human and social services, educational, animal welfare, etc.).

2. IUB Office of Service Learning (Casey Klippel, Devyn Manschot, Joe Primavera, Kate Swanson, Kate White)

Andrew Libby
Community Engagement Coordinator, Service-Learning Program
Center for Innovative Teaching and Learning
Office of the Vice Provost for Undergraduate Education (OVPUE)
Franklin Hall 004, Bloomington, IN 47405
(812) 856-5686

With help from SPEA S362 students last year, the Office of Service Learning was successful in having IUB recognized on the Corporation for National and Community Service's President's Honor Roll. More on this recognition at http://newsinfo.iu.edu/news/page/normal/18651.html

Andrew Libby has asked for another team of students to continue the data-collection this fall, and to help with the renewal of our application. This project mostly involves contacting campus student organizations to produce data on the civic engagement activities they sponsor, but also will involve some writing: there is a narrative section in the application which covers descriptions of campus-community projects with data for each. Last year, Andrew wrote this section and featured the ACE Program, Kelley's Civic Leadership Development, and the Fairview Violin Project. He would like students to identify and write about three different projects/programs for the application this year.

Learning opportunities: This project will emphasize the intersection between public policy and the promotion of student civic engagement. The data collection will be very hands on (you will do most of it yourselves). You'll also have an opportunity to learn what kind of civic engagement impact a university can have on a community.

3. Hoosier Hills Food Bank (Mara Jacobucci, Laura Laughlin, Carly Lillwitz, Claire Van Landingham)

Amanda Elliott, ACE
amajelli@umail.iu.edu

This is a different service learning opportunity than the others in that the emphasis is on direct service rather than a consulting kind of project. After a short orientation at Hoosier Hills Food Bank, students will work with an Advocate for Community Engagement, Amanda Elliott, to determine the exact nature of your assignments, which most likely will involve helping in the warehouse, working in the garden and gleaning programs, volunteering with HHFB's food rescue program on Monday, Wednesday, and Friday evenings, and occasionally some office work. Students will also work with volunteer coordinator Kai Westerfield to schedule further volunteer times. Students will be expected to volunteer 3-5 hours per week. Students will have regular access to food bank staff to answer questions about nonprofit mission, organization and any other management questions.

Learning opportunities: Good project for students who want to take on a direct service role. The learning opportunities are mostly related to understanding effective volunteer coordination, motivation and management, and hunger but this is also a great opportunity to observe an organization's operations from many different points of view. Lots of good material for tests and papers.

4. Feasibility Study for getting tax deductions on gifts to SPEA student activities (Kate Calvert, Kristin Jaffe, Rebecca Mandell, Stefan Scherer-Edmunds, Danielle Vetter)

SPEA hosts an increasing number of student organizations (I am compiling a list which you will update) and also engages in a lot of fundraising to support student professional development. For example, the Nonprofit Management Association (serving MPA/MAAA students) raised $1,000 in 2010 from direct solicitation of faculty and staff. The most active organization in this respect is the SPEA Auction, which raises more than $10,000 annually from alumni/students/faculty/staff/ community members at a special event and uses the funds to support graduate student enrichment and professional development activities such as unpaid summer internships.

But none of these gifts are currently tax deductible for the donors because the organizations are not formally recognized by the IRS and don't fall under the efforts of the IU Foundation (which is a registered charity). SPEA will be the client on this project, supervised by me with support from the External Relations office. Your task is to gather information about the feasibility of getting these gifts recognized as tax deductible. Options might include creating a new charity. You will gather information and prepare a report for the External Relations office.

Plan of Action:

1. Complete the student org list: Add names for other degree levels, and confirm w/ Jennifer Forney the completeness of the Masters list. Talk to Undergrad Programs Office, PhD office.
2. Create interview list from faculty, staff names. These should include:
   a. Development Director for SPEA
   b. Susan Johnson, Director of External Affairs, SPEA
   c. Someone at the IU Foundation, who could be recommended by our Dev Office.
   d. Selected faculty advisors to these student groups (ask the student groups).
   e. Other?
3. Determine interview questions. Our questions must help us determine three things:
   a. The value to student orgs of creating a new org, such as the ability to facilitate tax-deductible gifts
   b. The legality of doing this, according to IU Foundation policy
   c. The potential tradeoffs and complications, including reporting and governance requirements.
   d. Alternative plans to creating a new organization (this is where the IU Foundation will help).
4. Look for models at other schools within IUB and elsewhere.
5. Write a report and make a presentation to the External Relations office.