

University of Lethbridge



FACULTY OF MANAGEMENT
MANAGING NOT-FOR-PROFIT ORGANIZATIONS
MGT 3710 Y – SUMMER I 2015
Tuesday & Thursday, 6:00PM – 8:50PM | ROOM: S4032

INSTRUCTOR

Karen Whiteman

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4038637482 Feel free to text!

OFFICE HOURS

Tuesday/ Thursday 5:30-6PM or 9-9:30PM & by email appointment

COURSE MATERIALS

Required Textbook: Custom Coursepack (**Order through bookstore.uleth.ca**)

COURSE DESCRIPTION

Not for profit organizations play a vital role in Canadian society yet, in comparison to the for profit sector, are not studied to a large degree in many business schools. This course will provide students with an introduction to current information relating to the major management issues that not for profit organizations confront in their pursuit to be both effective and caring organizations.

To be specific, there are a number of major topics areas that challenge not for profit managers, each of which will be addressed in this course. These topics areas include (but are not limited to) the recruitment and management of volunteers, the role of boards in the governance of not for profit organizations, and the methods employed to raise funds to sustain and grow these organizations. For each topic area, students will be encouraged to participate in discussions and use their critical thinking skills to apply their knowledge to various organizational situations.

In addition to the presentation of key concepts in class, the instructor will endeavor to provide students with a 'real life perspective' of not for profit organizations. This class is highly interactive with an emphasis on class discussion related to the assigned readings.

PRE-REQUISITES / CO-REQUISITES / EQUIVALENTS

Third-year standing (minimum of 60.0 credit hours).

COURSE LEARNING OBJECTIVES

- a) to introduce students to the key management issues facing not for profit organizations, and to develop skills to effectively manage these issues
 - b) to contrast the foundation and application of management concepts between the for profit and not for profit sectors
 - c) to gain an appreciation for the work of not for profit organizations, as well as the contribution these organizations make to society
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REQUIRED READING

Coursepack from bookstore- Order at bookstore.uleth.ca

Students are also responsible for material distributed/identified during the term.

The following websites provide links to material that the students may find useful.

Web Sites:

Canadian Centre for Philanthropy: <http://www.ccp.ca>

Charity Village: <http://www.charityvillage.com>

Muttart Foundation: <http://www.muttart.org>

Resource Centre for Voluntary Organizations: <http://www.rcvo.org>

Non Profits Canada: <http://www.nonprofitscan.ca/>

Volunteerism: <http://www.volunteer.ca>

Calgary Chamber of Voluntary Organizations: www.calgarycvo.org

It is the responsibility of the student to read all assigned material which will be included on examinations, whether reviewed in class or not. Examinations will be integrative of assigned readings, class discussions, guest lectures etc.

METHOD OF ASSESSMENT

ASSIGNMENT	VALUE	DUE DATE
Midterm	20%	Thurs, May 28 th
Final exam-open book	25%	Thurs, June 18 th
Research presentation	25%	Thurs, June 11 th & Tues, June 16 th
Experiential Learning report	20%	Last day of class – June 16 th
Participation	10%	Ongoing
Total	100%	

PERFORMANCE ASSESSMENTS

ASSIGNMENTS:

Research Presentation:

Students will, in teams of two or three, identify a nonprofit organization of their choice and interview a key member of that organization (board member, coordinator/executive) on one or two elements of the following subject areas:

- Board Development
- Fundraising
- Marketing
- Volunteerism
- Strategy
- Corporate Volunteerism
- Program Evaluation

In the schedule (following this section) various readings are identified. For most of the sections for which interviews and to be conducted and reports presented to the class there are several readings. I also will make available additional readings if necessary and a maximum of two groups can present on any one reading. Choose one chapter or article for your topic area and base interview questions on this reading. You will present the results of your learning to the class in a 15-20 minute (minimum) presentation. In this presentation you will present your learnings from the research interview as a case study to support and/or contrast material from the readings. You will also be expected to reference *The Canadian Nonprofit and Voluntary Sector in Comparative Perspective* to position the nonprofit you interviewed in the context of the Canadian nonprofit/volunteer sector.

Your classmates will be expected to have read the chapter/article being presented upon and ask informed questions and provide meaningful feedback (this is a clear component of participation in this class) and participate in the evaluation of the presentation. You will also be required to develop and distribute to the class an organizational chart of your organization based on your interview. Further details will be discussed in class. A grade of zero will be given for any missed presentation. All team members must be present for a team-based presentation; missing members will receive a zero for the assignment. Interviews must be submitted to the instructor a minimum of 3 days prior to the interview (10 marks will be deducted from assignment grade if this is not done).

Experiential Learning:

Students will be required to volunteer for a nonprofit in the community. The students are responsible for identifying the nonprofit, although the instructor will assist with this as necessary. A minimum of 9 hours must be spent in the nonprofit over the course of the term (on a schedule suitable for the student and the nonprofit). This time may include any time in direct contact with the organization (including actual volunteer activity, volunteer interview etc.). The deadline for this assignment is flexible—students may submit it at any time up until the last day of class. By the end of term, students will submit a 5 page report to the instructor documenting their learning experience **and relating it to course concepts and materials**. Further details will be provided in class.

Emailed assignments are encouraged. Please make sure that they are appropriately addressed (make sure that you identify it in subject line—for example—Subject: Experiential Learning Mgt3710. Title the document with your surname(s)... for example: Smith.doc. Also, label the document with your name on a title page that is part of the same document as the paper or as a header on the document.) Please do not use PDF files. I use track changes to make comments and give you feedback.

Participation:

Students will be evaluated by the instructor and their peers on the basis of active, professional and constructive participation in the class discussions and outside class course related activities. In all organizational settings, the ability and willingness to voice opinions and share information is critical. Having concerns, input or objections to your colleagues' viewpoints will not contribute to your organization unless you share your insight. Peer interaction is an important component of learning. In organizational settings, 360-degree feedback has become a norm—employees are evaluated by and evaluate peers, subordinates and supervisors. As such, it is essential to attend actively to the contributions others are making to projects, discussions, meetings etc. Students will be given opportunities to interact with their peers and to provide feedback to the instructor on whether their peers' interactions contribute meaningfully to the class.

Professional interaction and engaged participation that contributes to the learning and engagement of others are the key criteria evaluated as it relates to interactions both within and outside of the classroom (for example, during the volunteerism and group work portions of the curriculum). The instructor maintains ultimate discretion over the awarding of all participation grades. Classroom attendance for regular class periods, while not mandatory, is strongly encouraged. Attendance is taken to facilitate the evaluation of participation. Although "points" will not be awarded for attendance, please note that a pattern of nonattendance will impact participation grades.... If you aren't in class, you obviously aren't participating. Attendance for tests and in-class assignments is mandatory and absence will result in an F for that test or assignment. Attendance for guest presentations is mandatory and 2% will be deducted from cumulative participation grades for each absence. (For example: for a student whose cumulative participation grade is 13/15, one absence would result in the grade being lowered to 11/15. Attendance will be taken at the beginning and end of guest lecture and presence is required both at the start and end of the period to constitute attendance.

****No late work is accepted!**

EXAMS:

Midterm – May 28 (1 hour)

- The mid-term will look at lectures and readings to date. It will consist of multiple choice and long and short answer questions. This will be closed book.

Final exam – June 18, 2015 (3 hours)

- This will be an open book exam consisting of case study questions where you will be asked to use your reading and notes to offer analysis and advice to the organizations discussed.

GRADING SCHEME

Percent Mark	Letter Grade	Percent Mark	Letter Grade
95-100	A+	90-94	A
86-89	A-	82-85	B+
78-81	B	74-77	B-
70-73	C+	66-69	C
62-65	C-	58-61	D+
50-57	D	0-49	F

COURSE POLICIES

- Prerequisites.** It is the responsibility of students to check the prerequisites for courses before registration. If students are found to be registered in a course for which they do not have the prerequisites and they have not received prior permission from the appropriate program chair, they can be de-registered. If this occurs after the drop/add date, tuition will not be refunded.
- Mid-term Examinations.** Alternative arrangements for writing a missed midterm examination may be made at the discretion of the instructor. Deferrals may only be granted in extenuating circumstances beyond the student's control. Work commitments, holidays, or traffic are not considered legitimate reasons for missing an exam.
- Final Examinations.** Students who fail to write final examinations must provide satisfactory evidence of illness or extenuating circumstances AND must have the approval of the Dean for a makeup exam. Work commitments, holidays or traffic are not considered legitimate reasons for missing an exam. For unsubstantiated missed final exams that are not approved for makeup by a Dean, a grade of F (0 marks) will be given.

Deferred final exams can only be written at times set by the school and instructor. Please note that if a final exam deferral is granted, the date will be set by the instructor and department. Students who fail to write a deferred final examination must provide satisfactory evidence of illness or extenuating circumstances AND must have the approval of the Dean for a makeup exam. Work commitments, holidays or traffic are not considered legitimate reasons for missing an exam. For missed deferred exams, a grade of F (0 marks) will be given.

- Conduct of Examinations:** The instructor may articulate regulations for late entry to and early exit from the examination room. Instructors may also prescribe or restrict materials that may be used during the exam. No material aids including such items as: mobile phones, computers, or other digital devices, may be brought into the examination site without prior approval from the instructor. Please see additional examination policies in the 2015/2016 University Calendar, page 80.
- Academic Dishonesty and Plagiarism:** Academic Dishonesty and Plagiarism will not be tolerated and will automatically result in a zero grade for the submission. Any student caught plagiarizing may also be subject to additional University sanctions. The University of Lethbridge subscribes to an electronic plagiarism detection service. Students may be required to submit their written work in electronic form for plagiarism checking.

6. **Student Conduct:** The University's policies are described in the calendar and all students are expected to read, familiarize, and comply with them. Special care should be taken to understand the Student Discipline Policy for academic and non-academic offenses as listed in part 4, sections 4 through 8 of the 2015/2016 Academic Calendar.

Students will respect the basic standards of intellectual integrity, including, but not limited to, refraining from plagiarism, cheating or duplicating someone else's work. In addition, students are expected to take an active role in encouraging other members of the academic community to refrain from academic dishonesty, and are asked to advise the instructor if they are aware of any such violations. This provision applies to any work submitted as a group project.

CLASS SCHEDULE

Below is a tentative outline. Recognizing that teaching excellence requires a degree of flexibility and responsiveness to both students' needs and emergent circumstances, adjustments to the course outline may sometimes be necessary, provided that no student is disadvantaged by the change.

DATE	TOPIC	PRE-CLASS READINGS (SEE FINAL PAGE OF OUTLINE)
Class 1 – May 7	Introduction	
Class 2 – May 12	Overview of the Scope of Nonprofits in Canada and Alberta	
Class 3 – May 14	Volunteerism and Corporate Volunteering	
Class 4 – May 19	Volunteerism and Corporate Volunteering	
Class 5 – May 21	Executive Leadership and HRM	
Class 6 – May 26	Governance: Boards of Directors	
Class 7 – May 28	Midterm Fundraising	
Class 8 – June 2	Fundraising continued	
Class 9 – June 4	Strategy Performance Evaluation	
Class 10 – June 9	Nonprofit Marketing/ Social Enterprise	
Class 11 – June 11	Research Report Presentations	
Class 12 – June 16	Research Report Presentations Experiential Learning Report	
June 18	Final exam	

Pre-class Readings

Only the documents in the coursepack are required unless otherwise stated.
The rest are supplemental.

Class 3

-The Nonprofit and Voluntary Sector in Alberta

http://www.imaginecanada.ca/files/www/en/nsnvo/f_alberta_sector_report.pdf

-The Nonprofit and Voluntary Sector in Canada

<http://www.statcan.gc.ca/pub/13-015-x/13-015-x2009000-eng.pdf>

-Strengthening Capacity

http://www.imaginecanada.ca/files/www/en/nsnvo/a_strengthening_capacity_of_organizations.pdf

-Skim read the following online resources:

- Incorporating a Society in Alberta review online at: <http://www.servicealberta.gov.ab.ca/716.cfm>
- Registering a Charity for Income Tax Purposes (CCRA) review online: <http://www.cra-arc.gc.ca/chrts-gvng/menu-eng.html?=#slnk>

Required reading

The Canadian Nonprofit and Voluntary Sector in Comparative Perspective. Students are encouraged to read this report in the first few of weeks of term and will be expected to reference it effectively in their research presentations. This should be referenced in ALL research presentations <http://sectorsource.ca/resource/file/canadian-nonprofit-and-voluntary-sector-comparative-perspective>

Classes 4 & 5

-Building Stronger Communities

-Understanding Canadian Volunteers

-Estimating and Reporting Volunteer Contributions (groups presenting on this topic are advised to seek direction from instructor)

-Fundraising by Canadian Charities (Revenue Canada) <http://www.cra-arc.gc.ca/chrts-gvng/chrts/plcy/cgd/fndrsng-eng.html>

-Trends in Individual Donations: Lazby – <http://www.imaginecanada.ca/files/www/en/researchbulletins/rb1501en.pdf>

-The Impact of Company Support

-Business Support for Volunteerism (groups presenting on this topic are advised to seek direction from instructor)

Class 6 – Read and be prepared for discussion:

<http://www.muttart.org/sites/default/files/downloads/TAC2008-02-ExecutiveSummary.pdf>

<http://www.desmog.ca/2013/04/17/Charity-series-part-1-canada-s-fake-non-debate-definition-charity>

-Who are the Managers of Volunteers (http://www.cavrcanada.org/Library/Docs/Environics_study2003.pdf)

-UP Next Generation Change and the Leadership of Nonprofit Organizations

<http://www.aecf.org/upload/publicationfiles/ld2928k643.pdf>

-Daring to Lead: Compass Point Foundation

http://www.compasspoint.org/sites/default/files/docs/research/Daring%20to%20Lead%202011%20Main%20Report_062211.pdf

-The Board and the Executive Director: Developing a Nurturing Relationship: Sloan

http://www.muttart.org/sites/default/files/Sloan_K_The%20Board%20and%20Executive%20Director.pdf

-Costs and Contributions of Professional Nonprofit Management: Lessons from Hospitals

-Who are the Managers of Nonprofits

Class 7

-Carver Governance (not in reader) access at <http://www.carvergovernance.com/model.htm>

-National Study of Board Governance Practices in the Non-Profit and Voluntary Sector in Canada (2006)

http://www.strategicleveragepartners.com/bhg768kjmhgvxxyzwq/National_Study_of_Board_Governance_Practices_in_the_Non-Profit_and_Voluntary_Sector_in_Canada.PDF

-Facing the Risk

<http://www.robertsonhall.com/pdf/Abuse%20Litigation%20and%20It's%20Impact%20on%20Future%20Charitable%20Work.pdf>

-Diversity in Governance – <http://diversecitytoronto.ca/wp-content/uploads/Diversity-on-Non-Profit-Boards-Toolkit.pdf>

Classes 8 & 9

-Understanding Canadian Donors

-Credits and Tax Donations (groups presenting on this topic are advised to seek direction from instructor)

Class 10 – Required Readings

-Strategy Reading, Balanced scorecard – <https://hbr.org/2007/07/using-the-balanced-scorecard-as-a-strategic-management-system/ar/1>

-Assessing Performance, Evaluating Practices – <http://volunteer.ca/content/assessing-performance>

Class 11

-Chapter from Nonprofit Marketing from reader

-Cause Marketing: Toward an understanding of Fit – http://www.cerog.org/lalondeCB/CB/2003_lalonde_seminar/161-174_pap_34-rev_basil_basil.pdf