

# MEMORANDUM

TO: Frank Sanacory, Chair, CAP Committee  
FROM: Edward Bever, Director, School of Professional Studies  
SUBJ: Proposal for Badge in Non-Profit Management  
DATE: March 2, 2018

I am submitting for consideration by the CAP Committee a proposal for a Badge in Non-Profit Management to be offered by the School of Professional Studies. Students will earn the badge by taking the two existing required Professional Studies courses in the Congregational Leadership Minor with a grade of B or better. The goal is to give students who want to gain the competencies and skills in non-profit management imparted by these courses but are not interested in applying them in the area of congregational leadership a credential to work toward and point to when seeking employment.

Since the College does not at present offer any Badges, this proposal is being submitted to serve as a pilot program for the introduction of these Micro-Credentials. The first section here will therefore discuss the nature of these credentials and the reasons why they are being adopted in higher education in general, while the subsequent sections will discuss the purpose, demand, and resource implications and lay out the structure of the Non-Profit Management badge in particular.

## **I. Micro-Credentials and Badges**

Micro-Credentials are awards given to students for the achievement of specific sets of skills or competencies. The skills and competencies can be achieved through credit or non-credit work. In the case of credit-bearing work, which is what is under consideration here, the skills and competencies can be gained through work scattered across a variety of courses and measured by performance on specific assignments, or contained in a defined set of courses, in which case they are measured by their correspondence of the learning outcomes of the courses. In the latter case, which is under consideration here, the number of courses is limited, typically 2-4, to differentiate them from Minors and Certificates, which are generally 20 or more credits.

Badges are a specific form of micro-credential that derive their name from the fact that they are typically represented by a clickable digital icon that can be embedded in an online resume or LinkedIn profile, which when clicked lead to a page with information about the specific competencies and skills the badge represents, the institution conferring the badge, and possibly links to more detailed course information or even work produced in earning the badge. However, the term "badge" has come to be used more generically for micro-credentials that are not industry-specified certifications for workplace training or professional accreditation, and when they represent achievements in credit-bearing courses, they can, and ultimately should, be recognized on traditional transcripts maintained by college registrars.

The value of badges for credit-bearing work is fourfold. First, and most important, is their pedagogical value: by recognizing student achievement beyond the scope of one course but more immediately than the attainment of a four-year degree, they can provide an important motivation, an attainable goal, for students to persist at their studies, and a sense of accomplishment that can fuel further effort toward the degree. Second, they can highlight specific skills and competencies to potential employers, not only upon completion of the degree, but also to help students get internships and better jobs while still studying. Third, badges are flexible for the College: the SUNY system has specifically adopted the position that they are similar to minors in that they are entirely campus based, and do not need to get approvals from SUNY or SED.<sup>1</sup>

However, and this is the fourth value of badges, in contrast minors, which are only awarded upon completion of the bachelor's degree, badges are stand-alone credentials that are awarded upon completion of their requirements, which not only makes them helpful for students seeking internships and better jobs while continuing their studies, but also makes them attractive to non-matriculated students, which does not just open a potential new source of students for the College, but also creates a new relationship between it and the community more tailored to the 21<sup>st</sup> century, with its declining pool of 18-22 year olds and rising need for continuous, or at least periodic, upgrading of skills and retraining of adults. At the same time, the fifth and final value of badges is that they are stackable, which means that earning one can lead the student to enroll in a larger credential, in particular, a non-matriculated student earning a badge might go on to earn a certificate, or matriculate and pursue a bachelors degree.

Because of these values, the SUNY system is supportive of the introduction of micro-credentials. The SUNY Provost created a Task Force comprised of faculty and administrators that spent several years working on a report defining them, outlining their relationship to existing credentials and governance structures, and providing resources for campuses as they explore their potential fit with their individual missions and traditions. The Task Force issued a draft report in September, 2017; SUNY solicited feedback on it from campuses, and held a workshop about it in Saratoga Springs in November, and issued its final report in January 2018. The report recommends that “the System Provost should encourage and support campus development of micro-credentials,” and, indeed, in a memo accompanying the final report, the Provost noted:

During the January 2018 SUNY Board of Trustees meeting, the SUNY Trustees unanimously voted to endorse the definitions and taxonomy of terms, guiding principles, and recommendations of the Task Force. We talked about how micro-credentials align with a key priority identified by Chancellor Johnson—individualized learning. It is clear that the wide array of possibilities available through micro-credentials can afford students with an opportunity to differentiate their learning experience.

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<sup>1</sup> SUNY Micro-Credentialing Task Force Report and Recommendations, January 2018, pp. 7, 19.

## **II. The Badge in Non-Profit Management**

### **A. Purpose**

The Badge in Non-Profit Management is designed for students holding or aspiring to leadership positions in non-profit organizations. Its courses cultivate the basic skills and competences needed to manage the administrative, financial, and governance aspects of non-profits. The Badge will be available to currently enrolled students as well as members of the larger Long Island community with a desire to gain certified enhancement their skills in these area.

### **B. Demand**

The New York/Long Island region is home to thousands of non-profit organizations that provide a wide variety of invaluable services to the community. In the five eastern-most towns of Suffolk County alone there are “over 1,075 registered nonprofit organizations that provide basic needs, leadership on sustainability and environmental issues, preservation and presentation of arts and culture, and educational support.”<sup>2</sup> To provide these services, the non-profits employ over 100,000 people and pay over \$5,000,000 in wages and salaries.<sup>3</sup> To maintain their staffing, non-profits on Long Island collectively recruit hundreds of new employees at any one time: currently one online jobs site lists 4,778 jobs in non-profits within 25 miles of Old Westbury (including New York City) and 450 within 15 miles of campus.<sup>4</sup> A second site concurs, with 454 jobs listed within 15 miles of Old Westbury, and 356 of them are full-time.<sup>5</sup> Considering Old Westbury’s venerable commitment to promoting social justice, it seems natural that the College would support students’ ability to translate good intentions into effective action.

### **C. Resources**

Courses offered by the School of Professional Studies for the badge are already being offered as part of the Congregational Leadership minor, which populates them enough to sustain them but not to fill them. These classes are scheduled on the weekends, when the physical facilities of the College are under-utilized, and they are taught by adjunct faculty, so instructional costs are modest and easily met on a class-by-class basis. These courses also serve as major electives in the BPS in Professional Studies program.

## **III. Additional Materials**

Following is catalog copy for the badge, modeled on the catalog copy for minors, and the syllabi for the two courses in the badge. The CV of the adjunct faculty member who teaches them and who was consulted on the articulation of the minor’s skills and competencies and the learning outcomes of the courses accompanies this as a separate PDF.

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<sup>2</sup> <http://www.aftee.org/not-for-profits/>. Accessed 3/2/18.

<sup>3</sup> Long Island’s Not-For-Profit Sector: Doing More with Less During a Period of Economic Change”, The Long Island Association, Inc., June, 2011, p. 6. Available at [http://www.licf.org/Portals/0/Uploads/Documents/latest\\_non\\_profit\\_study\\_lo\\_res.pdf](http://www.licf.org/Portals/0/Uploads/Documents/latest_non_profit_study_lo_res.pdf). Accessed 3/2/18.

Note that these

<sup>4</sup> <https://www.indeed.com/q-Non-Profit-I-Long-Island,-NY-jobs.html>. Accessed 3/2/18.

<sup>5</sup> [https://www.simplyhired.com/search?q=non-profit&l=long+island%2C+ny&job=YwNI00OgV-i-aDLTSTyTwV8cdsR\\_AUEI8FtFPkVRtapYZPQpA6P0xA](https://www.simplyhired.com/search?q=non-profit&l=long+island%2C+ny&job=YwNI00OgV-i-aDLTSTyTwV8cdsR_AUEI8FtFPkVRtapYZPQpA6P0xA). Accessed 3/2/18.

# Non-Profit Management Badge

Sponsoring school: Professional Studies

The Badge in Non-Profit Management is designed for students holding or aspiring to leadership positions in non-profit organizations. It consists of two courses, one on the managerial and the other on financial issues that leaders of nonprofit organizations face. Students successfully completing the requirements of the badge will be prepared to help manage a nonprofit organization's operations, finances, and planning.

## Requirements

Students are required to take 8 credits by completing both of the following courses with a grade of B or higher:

PS3625	Nonprofit Stewardship	4 credits
PS4630	Financial Administration of Nonprofits	4 credits

## Skills and Competencies to be Gained

Students who complete these courses at the stipulated level will:

- Understand the role and structure of the nonprofit sector in contemporary society.
- Know the management issues that arise within nonprofit organizations and how to use this knowledge to successfully lead one.
- Understand public governance and how to participate in and contribute to public policy-making as a leader of a nonprofit organization.
- Have a knowledge of basic accounting principles, financial statements, financial planning processes, and audit and reporting requirements as they pertain to nonprofit organizations.
- Demonstrate an ability to use that knowledge to perform basic analyses of nonprofits' finances and use them in operations and planning.
- Be able to communicate this knowledge and the results of these analyses to organizational leadership, board members, and community stakeholders.

**SUNY COLLEGE AT OLD WESTBURY  
SCHOOL OF PROFESSIONAL STUDIES**

**COURSE: PS3625 Nonprofit Stewardship 4 cr.** This course surveys concepts of leadership, leadership styles, techniques of motivation, and communications skills. It examines how to build relationships, find supporters, enhance income, and raise funds, and considers the administrative, legal, and ethical issues related to ensuring the sustainability of the organization and budget. Prerequisite: EMS

**LOCATION:** H220

**MEETING TIMES AND DAYS:** Alternate Saturdays from 1:00 pm to 4:10 pm starting September 9, 2017 and ending December 16, 2017. The course will be conducted in a hybrid format, with online work equivalent to a class meeting in the two weeks between classroom meetings.

**SEMESTER:** Fall 2017

**INSTRUCTOR:** Mr. Nigel Codrington

**E-MAIL:** [codringtonlw@yahoo.com](mailto:codringtonlw@yahoo.com)

**OFFICE HOURS:** Alternate Saturdays, 4:30pm – 5:30pm, BY APPOINTMENT ONLY

**TEXT:** Managing Nonprofit Organizations  
Mary Tschirhart, Wolfgang Bielefeld  
ISBN: 978-1-118-23388-7  
512 pages  
July 2012, Jossey-Bass  
Hardcover \$86.50  
E-book \$69.99

**COURSE LEARNING OBJECTIVES**

By the end of the course, students will be able to:

- Demonstrate an understanding of the size, structure and importance of the nonprofit sector.
- Demonstrate a general knowledge of scholarly theories that explain the existence of the nonprofit sector.
- Demonstrate an understanding of the leadership and management issues that arise within nonprofit organizations.
- Demonstrate an understanding of how to lead and manage in public governance.

- Demonstrate an understanding of the public policy-making process and how leaders of nonprofits participate in and contribute to it.
- Analyze case situations and suggest plausible solutions
- Demonstrate an ability to synthesize wide-ranging, current information
- Make cogent, coherent and well structured written and oral presentations
- Analyze, synthesize, think critically, solve problems, and make decisions

### **USE OF TECHNOLOGY**

Each class session will include a power point presentation of the contents of the relevant textbook chapter. The outline for each presentation will be made available to each student on the Blackboard site.

### **GRADING POLICY**

The final grade will be based on completion of the following assignments. With the exception of written exams, ALL assignments are to be submitted through Blackboard.

### **Assessment Descriptions**

**Reading Reflections:** There are SIX assigned reading reflections which will be posted in the “Discussions” section of Blackboard. Each reading reflection will require two components (1) a response to the reading assigned of approximately two paragraphs in length, and (2) a peer-response to one of your classmates. Each reflection is worth 5 points- 3 points for your response, and 2 points for your peer feedback. There are 6 non-class-meeting weeks between the meetings, so these discussions will be conducted in each of the “off” weeks.

**Case Study/Class Presentation:** In addition to the Reading Reflections done online, all students will make a live class presentation. Each week, one of you will choose an article from a publication (digital or print) that is directly related to the chapter(s) from the text that will be discussed in class on that day. A list of digital and print publications related to nonprofits are listed below. The case study will require students to read and analyze a scenario pertaining to a nonprofit organization. Students will prepare a presentation using print and electronic media under the following headings:

Nonprofit taxonomy (area of need served by the organization)

The mission of the organization

Type(s) of services provided to the community

Identification of an area in the organization facing one or more challenges or in which an interesting issue has developed Consider issues facing administration,

management, governance, communications, human resources, volunteers, technology and/or finance.

Description of the challenge/issue

Situational analysis/background ➦ State any relevant information that explains how and/or why the challenge/issue developed.

Suggested solutions to the challenge(s) or evaluation of the issue

I recommend the following sources:

*Chronicle of Philanthropy:*

<http://philanthropy.com/>

This weekly news journal of the nonprofit sector includes a summary of news, plus full-text of major feature stories.

*Foundation News & Commentary:*

<http://www.foundationnews.org/>

The bimonthly magazine of the Council on Foundations.

*International Journal of Nonprofit and Voluntary Sector Marketing*

<http://www3.interscience.wiley.com/journal/110481870/home?CRETRY=1&SRETRY=0>

*International Journal of Nonprofit and Voluntary Sector Marketing* provides an international forum for peer-reviewed papers and case studies on the latest techniques, thinking and best practice in marketing for the not-for-profit sector.

*Nonprofit Management and Leadership*

<http://www.josseybass.com/WileyCDA/WileyTitle/productCd-NML.html>

This refereed journal included articles written for both scholars and practitioners. The focus is on nonprofit governance, human resources, fundraising and financial management, and organizational effectiveness. It includes a calendar of conferences and meetings.

*Nonprofit Times*

<http://www.nptimes.com/>

This periodical includes the handy and enlightening Salary Survey--Nonprofit Executives: published in January, as well as the NPT Sector Report/Year-end Review.

*Nonprofit World*

<http://www.snpo.org/publications/nonprofitworld.php>

NW Focuses on organizational management and leadership from the practitioner's viewpoint. Published by the Society for Nonprofit Organizations.

*Philanthropy News Digest*

<http://foundationcenter.org/pnd/>

A weekly news summary on philanthropy.

*Voluntas: International Journal of Voluntary and Non-Profit Organizations*

<http://www.istr.org/pubs/voluntas/>

<http://www.springer.com/social+sciences/social+sciences,+general/journal/11266>

Another academic-leaning journal on nonprofits.

Idealist

<http://www.idealists.org/>

Great listings for nonprofit jobs and other handy info.

**Final Paper:** Nonprofit Strategic Plan (10 pages)

Select a nonprofit to assess for application of nonprofit theories and functions, effectiveness, and leadership as well as management. Present assessment of the nonprofit and critical issues facing the nonprofit in the next 2-3 years. Analyze and present the four nonprofit functions operating in this nonprofit. Develop a strategic action plan to address issues. Define theory of change, values, mission, vision, goals/strategies, measures of success. Create implementation time table to achieve nonprofit excellence.

**PRIOR TO THE SUBMISSION OF THE FINAL PAPER, STUDENTS SHALL:**

- submit a proposed topic,
- submit a list of sources of information, if applicable,
- prepare an outline (based on the model given below, but fleshed out with summary information).

THESE SUBMISSIONS SHALL BE SUBMITTED ONLINE

**A NONPROFIT MODEL OF EXCELLENCE STRATEGIC ACTION PLAN:**

Mission

Vision

Theory of Change

Values

Goals – Strategies

Financial Plan

Measures of Success

Program Services

Planning, Management, People Systems and Standards

Governance – Organization (Staff and Volunteer) Development

Results Tracking and Action

**GENERAL INSTRUCTIONS FOR FINAL PAPER FORMAT:**

- line space: 2.0
- Minimum margin, 1”;
- 12 point font;
- Times New Roman
- No typos
- Your name on each page
- Number the pages
- Use endnotes, if needed and attach a separate page with the full references

**GRADING CRITERIA FOR FINAL PAPER:**



1. Overall writing – the writing is fluid, format well structured, proper grammar, and overall illustrates command of college level vocabulary and understanding of concepts. (25%)
2. Professional presentation – correct spelling, no typographical errors, and instructions followed. (10%)
3. Analytical level – uses materials from class to develop and support a logical, clear and consistent argument evidencing solid critical thinking. (25%)
4. Positions and recommendations – applies insights to a practical discussion of management and/or policy making and reflects critical theories and policy considerations in nonprofit sectors. (35%)
5. References – used and cited appropriately. (5%)

**Midterm Exam:** The Midterm Exam will cover all content up to October 31 and will consist only of essay format questions.

**Final Exam:** The Final Exam will cover all content from October 31 through December 9 and will consist of only essay format questions.

**Grades will not be curved or dropped. No extra credit assignments will be permitted.**

**Grading Scheme:**

**A = 95-100, A- = 90-94, B+ = 86-89, B = 83-85, B- = 80-82, C+ = 77-79, C = 74-76, C- = 70-73, D+ = 68-69, D = 65-67, D- = 62-64**

## **ACCOMMODATING DISABILITIES**

If you have or suspect you may have a physical, psychological, medical or learning disability that may impact your course work, please contact Stacey DeFelice, Director, The Office of Services for Students with Disabilities (OSSD), NAB room 2065, Phone: 516-628-5666, Fax (516) 876-3005, TTD: (516) 876-3083, E-mail: defelices@oldwestbury.edu. The office will help you determine if you qualify for accommodations and assist you with the process of accessing them. All support services are free and all contacts with the OSSD are strictly confidential. SUNY/Old Westbury is committed to assuring that all students have equal access to all learning activities and to social activities on campus.

## **COURSE POLICIES**

### **a. Attendance**

As a hybrid course, students are expected to regularly log onto Blackboard and review course updates and announcements as well as participate in discussions. Class attendance on alternate Saturdays is mandatory.

If you must miss class, it is your responsibility to contact your classmates for any notes or assignments you may have missed. The instructor will not provide a private lecture if you miss class.

You are allowed 1 unexplained absence for the semester. Please note that you will not be penalized for religious , military service mandated absences or pregnancy- or childbirth-related absences. Absences for these reasons will not be counted toward the allowed number of absences. But you will be required to inform me through e-mail/written documentation regarding absences related to military service, pregnancy, childbirth, or religious observation. For all other absences/delays, I will exercise my judgment on whether or not to accept a late submission and/or assign penalties for tardiness/missing class.

Class will begin promptly. Please be in your seats when the class period begins. Please do not walk in and out of the classroom during the class period as it is disrespectful to the instructor and your classmates. If you must arrive late, please let the instructor know in advance. A student who is habitually late and/or absent will receive a grade of "0" (zero) on any assignment due that class period.

You will receive an Early Alert if you have either missed several classes or have not completed most of your work in the first few weeks of classes.

More than 3 undocumented and unexplained absences will result in a grade of F for the semester.

#### **b. Late Work**

Assignments turned in after the due date will incur a loss of 5% deduction for each day they are turned in late. Assignments will not be accepted if they are more than 3 days late.

#### **c. Grades of “Incomplete”**

Incomplete grades are given only in situations where unexpected emergencies prevent a student from completing the course and in which the remaining work can be completed the next semester. Your instructor is the final authority on whether you qualify for an incomplete. Incomplete work must be finished by the end of the subsequent semester or the “I” will automatically be recorded as an “F” on your transcript.

#### **d. Laptop/Mobile Device Use:**

All cellular phones and mobile devices must be turned off or kept on silent during the course. The use of laptops is permitted for taking notes, but students are still expected to remain engaged in class discussion.

**e. Civility:**

During class time we will engage in wide-ranging discussions that may generate some debate. While you are encouraged to be critical of opposing viewpoints, students must be respectful of the opinions of others at all times.

**f. Assignments:**

Assignments are due at the beginning of class. Any assignment turned in after class has begun will be penalized (up to and including a grade of zero).

**g. Make-up Exams:**

No make-up exams will be given unless the exam was missed because of a severe illness or an emergency. Under such circumstances, contact the instructor prior to the start of the exam to request a make-up exam. You will be required to provide written documentation (that may be substantiated) to take a make-up exam. I will exercise my judgment on whether or not to accept such documentation and/or assign penalties for tardiness/missing an exam.

## **ACADEMIC HONESTY**

All work, assignments and exams must be completed in accordance with the college's academic honesty policy which can be found in the Student Handbook, the College Catalogue, and the College website. Students are expected to read and familiarize themselves with the policy. If you have any questions regarding the policy, please speak with me in a timely manner.

## **PLAGARISM**

Plagiarism is basically using someone else's words without putting them in quote marks and given the source in a reference, or using someone else's ideas without indicating the source in a reference. The penalty for the first offense will be failure on the assignment; the penalty for the second offense will be failure in the course. All offenses will be reported to the Director of the School of Professional Studies. For more information on plagiarism, consult the Policy on Plagiarism at :

<https://www.oldwestbury.edu/schools/arts-sciences/academic-integrity>

## READING ASSIGNMENTS

The chapters(s) scheduled to be discussed in class on the dates shown in the course outline/pacing calendar below, should be read **before** the date of that given class.

### COURSE OUTLINE/PACING CALENDAR

DATE	TOPIC(S)
09/09/17	Chapter 1 Understanding Nonprofit Organizations  Chapter 2 Effective and Ethical Organizations
09/16/17	Overview of the Nonprofit Sector: <a href="http://www.urban.org/sites/default/files/publication/33711/413277-The-Nonprofit-Sector-in-Brief--.PDF">http://www.urban.org/sites/default/files/publication/33711/413277-The-Nonprofit-Sector-in-Brief--.PDF</a>  The Nonprofit Sector in Individual States: <a href="https://www.independentsector.org/resource/state-profiles/">https://www.independentsector.org/resource/state-profiles/</a>  These reflections will be posted in the “Discussion” section of Blackboard. Each reading reflection will require two components (1) a response to the reading assigned of approximately two paragraphs in length, and (2) a peer-response to one of your class mates. Each reflection is worth 5 point – 3 points for your response and 2 points for your peer feedback.
09/23/17	Chapter 3 Founding Nonprofits and the Business Case  Chapter 4 Organizational Structure

09/30/17	<p>What Do Nonprofits Stand For:  <a href="http://ccss.jhu.edu/wp-content/uploads/downloads/2012/12/What-Do-Nonprofits-Stand-For_JHUCCSS_12.2012.pdf">http://ccss.jhu.edu/wp-content/uploads/downloads/2012/12/What-Do-Nonprofits-Stand-For_JHUCCSS_12.2012.pdf</a></p> <p>Social Entrepreneurship:  <a href="http://compassionatelouisville.weebly.com/uploads/1/8/5/3/18531412/a_tale_of_two_cultures-dees-1.2013.pdf">http://compassionatelouisville.weebly.com/uploads/1/8/5/3/18531412/a_tale_of_two_cultures-dees-1.2013.pdf</a></p> <p>These reflections will be posted in the “Discussion” section of Blackboard. Each reading reflection will require two components (1) a response to the reading assigned of approximately two paragraphs in length, and (2) a peer-response to one of your class mates. Each reflection is worth 5 point – 3 points for your response and 2 points for your peer feedback.</p>
10/07/17	<p>Chapter 5 Formulation of Strategy</p> <p>Chapter 6 Resource Acquisition</p>
10/14/17	<p>Lofty Missions, Down-to-Earth Plans  V. Kasturi Rangan  <a href="https://hbr.org/2004/03/lofty-missions-down-to-earth-plans">https://hbr.org/2004/03/lofty-missions-down-to-earth-plans</a></p> <p>Strategic Planning:  <a href="https://newclasses.nyu.edu/access/content/group/ea5ac41a-6c65-4721-a587-8e7184573ee3/Reading%20Materials/Class%2010%3A%20Fundraising%20and%20Philanthropy/Blatstein%2C%20Ira.%20Strategic%20Planning.pdf">https://newclasses.nyu.edu/access/content/group/ea5ac41a-6c65-4721-a587-8e7184573ee3/Reading%20Materials/Class%2010%3A%20Fundraising%20and%20Philanthropy/Blatstein%2C%20Ira.%20Strategic%20Planning.pdf</a></p> <p>These reflections will be posted in the “Discussion” section of Blackboard. Each reading reflection will require two components (1) a response to the reading assigned of approximately two paragraphs in length, and (2) a peer-response to one of your class mates. Each reflection is worth 5 point – 3 points for your response and 2 points for your peer feedback.</p>

10/21/17	<p>Chapter 7 Financial Stewardship and Management</p> <p>Chapter 8 Marketing</p>
10/28/17	<p>The Cost of Fundraising:</p> <p><a href="https://www.philanthropy.com/article/Nonprofit-Inquiry-Reignites/156209">https://www.philanthropy.com/article/Nonprofit-Inquiry-Reignites/156209</a></p> <p>The role of Branding in the Nonprofit World:  <a href="https://bc2.berkeley.edu/wp-content/uploads/2012/07/the-role-of-brand-in-the-nonprofit-sector.pdf">https://bc2.berkeley.edu/wp-content/uploads/2012/07/the-role-of-brand-in-the-nonprofit-sector.pdf</a></p> <p>These reflections will be posted in the “Discussion” section of Blackboard. Each reading reflection will require two components (1) a response to the reading assigned of approximately two paragraphs in length, and (2) a peer-response to one of your class mates. Each reflection is worth 5 point – 3 points for your response and 2 points for your peer feedback.</p>
11/04/17	<ol style="list-style-type: none"> <li>1. Midterm Exam (Chapters 1-8)</li> <li>2. Review of answers to Midterm Exam questions</li> </ol>
11/11/17	<p>The Role of Leadership in Sustainability:  <a href="http://tccgrp.com/pdfs/SustainabilityFormula.pdf">http://tccgrp.com/pdfs/SustainabilityFormula.pdf</a></p> <p>Nonprofits and Lobbying:  <a href="https://newclasses.nyu.edu/access/content/group/ea5ac41a-6c65-4721-a587-8e7184573ee3/Reading%20Materials/Class%203%3A%20Civic%20and%20Political%20Engagement/Salamon_Nonprofit%20America-A%20Force%20for%20Democracy_Communique13.pdf">https://newclasses.nyu.edu/access/content/group/ea5ac41a-6c65-4721-a587-8e7184573ee3/Reading%20Materials/Class%203%3A%20Civic%20and%20Political%20Engagement/Salamon_Nonprofit%20America-A%20Force%20for%20Democracy_Communique13.pdf</a></p> <p>These reflections will be posted in the “Discussion” section of Blackboard. Each reading reflection will require two components (1) a response to the reading assigned of approximately two paragraphs in length, and (2) a peer-response to one of your class mates. Each reflection is worth 5 point – 3 points for your response and 2 points for your peer feedback.</p>

11/18/17	<p>Chapter 9 Boards and Governance</p> <p>Chapter 10 Executive Directors and Leadership</p>
11/25/17	<p>New Yorkers Volunteer:</p> <p><a href="http://www.newyorkersvolunteer.ny.gov/docfiles/New%20Yorkers%20Volunteer%20Report%20final%20-%20Stakeholders%20Survey.pdf">http://www.newyorkersvolunteer.ny.gov/docfiles/New%20Yorkers%20Volunteer%20Report%20final%20-%20Stakeholders%20Survey.pdf</a></p> <p>Nonprofit Self Assessment Tool:</p> <p><a href="https://newclasses.nyu.edu/access/content/group/ea5ac41a-6c65-4721-a587-8e7184573ee3/Reading%20Materials/Class%2014%3A%20Leading%20and%20Creating%20Non%20Profit%20Excellence/TACS_OrganizationSelfAssessmentTool.pdf">https://newclasses.nyu.edu/access/content/group/ea5ac41a-6c65-4721-a587-8e7184573ee3/Reading%20Materials/Class%2014%3A%20Leading%20and%20Creating%20Non%20Profit%20Excellence/TACS_OrganizationSelfAssessmentTool.pdf</a></p> <p>These reflections will be posted in the “Discussion” section of Blackboard. Each reading reflection will require two components (1) a response to the reading assigned of approximately two paragraphs in length, and (2) a peer-response to one of your class mates. Each reflection is worth 5 point – 3 points for your response and 2 points for your peer feedback.</p>
12/02/17	<p>Chapter 11 Strategic Human Resource Management</p> <p>Chapter 12 Motivation and Performance</p>
12/09/17	<p>FINAL PAPER DUE</p> <p>Chapter 13 Program Evaluation</p> <p>Chapter 14 Public and Government Relations</p>
12/16/17	<p>FINAL EXAMINATION:</p> <p>Chapters 9-14</p>

**SUNY COLLEGE AT OLD WESTBURY  
SCHOOL OF PROFESSIONAL STUDIES**

**COURSE: PS 4630 - Financial Admin of Non Profits.** Starting with the principles of bookkeeping, this course surveys the overall management of nonprofits' finances, including budgeting, reporting, financial planning, and controlling fiscal resources. It covers the analysis of financial statements, structuring and evaluating programs, audit responsibility, and managerial financial controls in an evolving financial and regulatory environment.

**LOCATION:** H215

**MEETING TIMES AND DAYS:** Alternate Saturdays from 1:00 pm - 4:10 pm starting Jan 27, 2018 and ending May 12, 2018. The course will be conducted in a hybrid format, with online work equivalent to a class meeting in the two weeks between classroom meetings.

**SEMESTER:** Spring 2018

**INSTRUCTOR:** Mr. Nigel Codrington

**E-MAIL:** [codringtonlw@yahoo.com](mailto:codringtonlw@yahoo.com)

**OFFICE HOURS:** Alternate Saturdays, BY APPOINTMENT ONLY

**TEXT:**

Coe, Charles K. Nonprofit Financial Management: A Practical Guide. John Wiley and Sons, 2011.

Please consider purchasing the e-textbook version of this text or renting the text from a reputable company online. Both are cost-effective options (Amazon and Barnes & Noble offerings ranged from \$20-35).

**COURSE LEARNING OBJECTIVES**

By the end of the course, students should be able to:

1. Describe the actual and potential roles of a nonprofit CFO.
2. Apply financial planning processes and techniques to nonprofit programs.
3. Understand basic accounting principles of nonprofit entities.
4. Describe the financial statements issued by nonprofit entities and the information communicated by each.



5. Perform basic analyses of financial information provided by nonprofit entities, including budgetary calculations, cost allocation techniques, capital planning, and operational needs.
6. Diagnose an organization's financial strengths and weaknesses.
7. Describe varied audit and reporting requirements.
8. Communicate basic financial information to organizational leadership, board members, and community stakeholders

### **USE OF TECHNOLOGY**

Each class session will include a power point presentation of the contents of the relevant textbook chapter. The outline for each presentation will be made available to each student on the Blackboard site.

### **GRADING POLICY**

The final grade will be based on completion of the following assignments. With the exception of written exams, ALL assignments are to be submitted through Blackboard.

#### **Grading:**

Reading Reflections	10%
Midterm Exam	30%
Final Exam	30%
Final Individual Project	15%
Class Presentations	10%
Class participation	5%

#### **Assessment Descriptions**

Reading Reflections 10% : There are SEVEN assigned reading reflections which will be posted in the "Discussions" section of Blackboard. Each reading reflection will require two components (1) a response to the reading assigned of approximately two paragraphs in length, and (2) a peer-response to one of your classmates. Each reflection is worth 5 points- 3 points for your response, and 2 points for your peer feedback. There are 7 non-class-meeting weeks between the meetings, so these discussions will be conducted in each of the "off" weeks.

Midterm Exam 30%: Four essay questions to answer three.

Final Exam 30%: Six essay questions to answer five

Final Individual Project 15%: Select a recent (within last ten years) nonprofit scandal. Using online resources such as newspapers, explain the facts surrounding the scandal, describe the nonprofit and its administration, explain how the scandal was uncovered, and

the result of the scandal. Describe any internal controls that were in place during the scandal and how they did/did not contribute to the scandal. Use the last section of your short paper to make recommendations to improve controls. The final individual project will total approximately EIGHT (8) double-spaced pages.

Class Presentations 10%: Each week, one of you will choose an article from a finance/business/economics publication (digital or print) that is directly related to the chapter(s) from the text that will be studied on that day. A list of digital and print publications will be posted on Blackboard. You should identify the questions/issues raised in the article and then lead a class discussion on them. It will not be necessary for you to answer those issues (although you can). The goal is for you to think about the issues and explore them in class.

Class participation 5%: Credit will be given for active participation (e.g., making thoughtful comments, asking probing questions and answering questions posed to the class) throughout the semester – not only in the last few weeks. You must come to class prepared.

**Grades will not be curved or dropped. No extra credit assignments will be permitted.**

**Grading Scheme:**  
**A = 95-100, A- = 90-94, B+ = 86-89, B = 83-85, B- = 80-82, C+ = 77-79, C = 74-76, C- = 70-73, D+ = 68-69, D = 65-67, D- = 62-64**

## **ACCOMMODATING DISABILITIES**

If you have or suspect you may have a physical, psychological, medical or learning disability that may impact your course work, please contact Stacey DeFelice, Director, The Office of Services for Students with Disabilities (OSSD), NAB room 2065, Phone: 516-628-5666, Fax (516) 876-3005, TTD: (516) 876-3083, E-mail: [defelices@oldwestbury.edu](mailto:defelices@oldwestbury.edu). The office will help you determine if you qualify for accommodations and assist you with the process of accessing them. All support services are free and all contacts with the OSSD are strictly confidential. SUNY/Old Westbury is committed to assuring that all students have equal access to all learning activities and to social activities on campus.

## **COURSE POLICIES**

### **a. Attendance**

As a hybrid course, students are expected to regularly log onto Blackboard and review course updates and announcements as well as participate in discussions. Class attendance on alternate Saturdays is mandatory.

If you must miss class, it is your responsibility to contact your classmates for any notes or assignments you may have missed. The instructor will not provide a private lecture if you miss class.

You are allowed 1 unexplained absence for the semester. Please note that you will not be penalized for religious, military service mandated absences or pregnancy- or childbirth-related absences. Absences for these reasons will not be counted toward the allowed number of absences. But you will be required to inform me through e-mail/written documentation regarding absences related to military service, pregnancy, childbirth, or religious observation. For all other absences/delays, I will exercise my judgment on whether or not to accept a late submission and/or assign penalties for tardiness/missing class.

Class will begin promptly. Please be in your seats when the class period begins. Please do not walk in and out of the classroom during the class period as it is disrespectful to the instructor and your classmates. If you must arrive late, please let the instructor know in advance. A student who is habitually late and/or absent will receive a grade of "0" (zero) on any assignment due that class period.

You will receive an Early Alert if you have either missed several classes or have not completed most of your work in the first few weeks of classes.

More than 3 undocumented and unexplained absences will result in a grade of F for the semester.

#### **b. Late Work**

Assignments turned in after the due date will incur a loss of 5% deduction for each day they are turned in late. Assignments will not be accepted if they are more than 3 days late.

#### **c. Grades of "Incomplete"**

Incomplete grades are given only in situations where unexpected emergencies prevent a student from completing the course and in which the remaining work can be completed the next semester. Your instructor is the final authority on whether you qualify for an incomplete. Incomplete work must be finished by the end of the subsequent semester or the "I" will automatically be recorded as an "F" on your transcript.

#### **d. Laptop/Mobile Device Use:**

All cellular phones and mobile devices must be turned off or kept on silent during the course. The use of laptops is permitted for taking notes, but students are still expected to remain engaged in class discussion.

**e. Civility:**

During class time we will engage in wide-ranging discussions that may generate some debate. While you are encouraged to be critical of opposing viewpoints, students must be respectful of the opinions of others at all times.

**f. Assignments:**

Assignments are due at the beginning of class. Any assignment turned in after class has begun will be penalized (up to and including a grade of zero).

**g. Make-up Exams:**

No make-up exams will be given unless the exam was missed because of a severe illness or an emergency. Under such circumstances, contact the instructor prior to the start of the exam to request a make-up exam. You will be required to provide written documentation (that may be substantiated) to take a make-up exam. I will exercise my judgment on whether or not to accept such documentation and/or assign penalties for tardiness/missing an exam.

## **ACADEMIC HONESTY**

All work, assignments and exams must be completed in accordance with the college's academic honesty policy which can be found in the Student Handbook, the College Catalogue, and the College website. Students are expected to read and familiarize themselves with the policy. If you have any questions regarding the policy, please speak with me in a timely manner.

## **PLAGARISM**

Plagiarism is basically using someone else's words without putting them in quote marks and given the source in a reference, or using someone else's ideas without indicating the source in a reference. The penalty for the first offense will be failure on the assignment; the penalty for the second offense will be failure in the course. All offenses will reported to the Director of the School of Professional Studies. For more information on plagiarism, consult the Policy on Plagiarism at :

<https://www.oldwestbury.edu/schools/arts-sciences/academic-integrity>

## READING ASSIGNMENTS

The chapters(s) scheduled to be discussed in class on the dates shown in the course outline/pacing calendar below, should be read **before** the date of that given class.

### COURSE OUTLINE/PACING CALENDAR

DATE	TOPIC(S)
01/27/2018	Chapter 2 Account for Transactions.
02/03/2018	<p>“An Executive Director’s Guide to Financial Leadership” By Kate Barr and Jeanne Bell</p> <p>This article will be posted in the “Discussions” section of Blackboard. Each reading reflection will require two components (1) a response to the reading assigned of approximately two paragraphs in length, and (2) a peer-response to one of your classmates. Each reflection is worth 5 points- 3 points for your response, and 2 points for your peer feedback.</p>
02/10/2018	<p>Chapter 3 Create the Internal Control System.</p> <p>Chapter 4 Manage the Audit.</p> <p>CLASS PRESENTATION: Bufinsky, Brittany V.</p>

02/17/2018	<p>“What Nonprofits Need to Know About Form 990” by By Joanne Fritz</p> <p>This article will be posted in the “Discussions” section of Blackboard. Each reading reflection will require two components (1) a response to the reading assigned of approximately two paragraphs in length, and (2) a peer-response to one of your classmates. Each reflection is worth 5 points- 3 points for your response, and 2 points for your peer feedback.</p>
02/24/2018	<p>Chapter 5 Evaluate Financial Condition.</p> <p>Chapter 6 Prepare and Manage the Budget.</p> <p>CLASS PRESENTATION: Folkes, Robert F.</p>
03/03/2018	<p>MIDTERM EXAMINATION: This will be done online on Blackboard based on Chapters 2, 3, 4, 5 and 6</p> <p>The Bridgespan Group: “How to Research a Nonprofit’s Financial Strength- Deep-Dive Approach “</p> <p>This article will be posted in the “Discussions” section of Blackboard. Each reading reflection will require two components (1) a response to the reading assigned of approximately two paragraphs in length, and (2) a peer-response to one of your classmates. Each reflection is worth 5 points- 3 points for your response, and 2 points for your peer feedback.</p>

03/10/2018	<p>Chapter 7 Manage Cash Flow.</p> <p>Chapter 8 Purchase Goods.</p> <p>CLASS PRESENTATION: Hung, Henry</p>
03/17/2018	<hr/> <p>“Hidden in Plain Sight: Understanding Nonprofit Capital Structure” by Clara Miller</p> <p>This article will be posted in the “Discussions” section of Blackboard. Each reading reflection will require two components (1) a response to the reading assigned of approximately two paragraphs in length, and (2) a peer-response to one of your classmates. Each reflection is worth 5 points- 3 points for your response, and 2 points for your peer feedback.</p>
03/24/2018	<p>1.</p> <p>Chapter 9 Contract to Provide a Service.</p> <p>Chapter 10: Manage Capital Assets and the Inventory.</p> <p>CLASS PRESENTATION: Lindsay, Daniel</p>

03/31/2018	<p>National Endowment for the Arts: “Financial Management Guide.”</p> <p>This article will be posted in the “Discussions” section of Blackboard. Each reading reflection will require two components (1) a response to the reading assigned of approximately two paragraphs in length, and (2) a peer-response to one of your classmates. Each reflection is worth 5 points- 3 points for your response, and 2 points for your peer feedback.</p>
04/07/2018	<p>Chapter 11 Invest Funds.</p> <p>Chapter 12 Manage Banking Relations.</p> <p>CLASS PRESENTATION: Prunty, Deirdre M.</p>
04/14/2018	<p>The Securities and Exchange Commission: “Beginners’ Guide to Asset Allocation, Diversification, and Rebalancing.”</p> <p>This article will be posted in the “Discussions” section of Blackboard. Each reading reflection will require two components (1) a response to the reading assigned of approximately two paragraphs in length, and (2) a peer-response to one of your classmates. Each reflection is worth 5 points- 3 points for your response, and 2 points for your peer feedback.</p>



04/21/2018	<p>Chapter 13 Borrow Funds.</p> <p>Chapter 14 Manage Risks.</p>
04/28/2018	<p>Barr, K. (2009). "Make good use of the treasurer and finance committee."</p> <p>This article will be posted in the "Discussions" section of Blackboard. Each reading reflection will require two components (1) a response to the reading assigned of approximately two paragraphs in length, and (2) a peer-response to one of your classmates. Each reflection is worth 5 points- 3 points for your response, and 2 points for your peer feedback.</p>
05/05/2018	<p>REVIEW: Chapters 7-14</p>
05/12/2018	<p>FINAL EXAMINATION:</p> <p>This will be done online on Blackboard based on Chapters 7-14</p>