



Leading Non-Profits in the 21st Century (ML 580/680) – 3 credits

Term and Year Offered: Summer 2021

Learning Environment: Online (synchronous and asynchronous)

Meeting Dates/Times/Place: The class will run from June 1 – June 25, 2021, with an additional assignment for DMin students due July 9th. The first week of the course is asynchronous. It is strongly suggested that students begin their reading for this week early. The 3 weeks, from June 7-25, will include a mix of presentations from the instructor, group discussion/exercises and student presentations. The format includes online synchronous and asynchronous segments as well as individual off-line readings and assignments. Synchronous sessions will be held Tuesdays and Fridays, June 8, 11, 15, 18, 22, and 25 from 10:00 am–1:00 pm CT.

About Your Instructor(s): Dr. Deborah Hagman-Shannon

Contact Information: dhagmanshannon@bexleyseabury.edu

Office Hours: Contact me via e-mail to schedule phone or videoconference appointments.

Course Description:

Nonprofit organizations face many challenges, not the least of which is the ability to be financially stable and grow in meaningful and appropriate ways. In the 21st Century, it is clear that the ability to articulate and “live” one’s mission is intrinsically connected with financial sustainability. More and more, we are seeing that this applies to nonprofits of all sizes and shapes, including churches and religious-based organizations. We face an uncertain future in all respects. And this uncertainty calls for thoughtful, well-informed leadership and stewardship. Church leaders, especially clergy, must understand what this means for them. In particular, this includes establishing and maintaining the cornerstones of an effectively managed organization with focus on:

1. What it means to be a nonprofit
2. Clear roles and responsibilities
3. Well-articulated and shared vision, mission and plans
4. Consistent and thoughtful ways of engaging parishioners, community members and others
5. Types and features of organizational budgets: program, operating, capital, cash flow
6. Calculating full costs for organizational sustainability
7. Managing a budget throughout the fiscal year
8. Principles and challenges of raising revenues
9. How leaders live, work and guide the organizations for which they are responsible.
10. Reflecting theologically on leadership in nonprofits and connections with personal and professional values.

Course Goals and Outcomes:

Students who successfully complete this course will:

Goal 1: Understand the history, structure, value and mission of nonprofit organizations and the need for specific management practices that reinforce and sustain public trust.

- **Course Learning Outcome:** You will be able to demonstrate an ability to accurately *explain* what it means to be a non-profit in terms of its nature, purpose, operational structure, and primary organizational characteristics. [DMin 2.1, 3.1 MDiv 5.3]
- **Assessment:** Furniture Bank or SBC Foundation Case Study, Group or Individual Project, Leadership Reflection Paper

Goal 2: Understand the roles and responsibilities in developing and managing various aspects of nonprofit operations and budgets, and gain appreciation for the part that leaders, staff and volunteers play.

- **Course Learning Outcome:** You will be able to demonstrate an ability to clearly *differentiate* and *describe* the respective roles, responsibilities, and contributions of leaders, staff, and volunteers in the design and management of various aspects of budgeting and managing non-profit finances. [DMin 2.1; MDiv 5.1, 5.3]
- **Assessment:** Furniture Bank or SBC Foundation Case Study, Group or Individual Project

Goal 3: Comprehend the differences between operational, capital expense and cash flow budgets, and understand when each is required as well as how to monitor actual vs. projected revenues and expenses.

- **Course Learning Outcome:** You will be able to demonstrate an ability to distinguish types and features of organizational budgets, to determine when each is required, and how to evaluate the need for adjustment throughout the fiscal year. [DMin 2.1; MDiv 5.3]
- **Assessment:** Individual or Group projects, Final Exam

Goal 4: Understand “hidden costs” and risk management, how to account for them, and the dangers inherent in not accounting for them.

- **Course Learning Outcome:** You will be able to *identify* and *account* for hidden costs and employ strategies for identifying and minimizing risk. [DMin 2.1 MDiv 5.3]
- **Assessment:** Furniture Bank or SBC Foundation Case Study, Racial Justice paper, Final Exam

Goal 5: Understand the leadership and management challenges related to being the leader of a nonprofit organization with specific attention to church-based settings.

- **Course Learning Outcome:** You will be able to demonstrate your capacity as a priest/spiritual leader to lead a non-profit in light your appreciation of how leaders of live, work and effectively guide the organizations for which they are responsible [DMin 2.3; MDiv 5.1]
- **Assessment:** Group or Individual Project, Final Exam, Leadership Reflection Papers, Racial Justice paper

A Word About Assessment: From Course Outcome Assessment to Program Assessment

Bexley Seabury Seminary regularly evaluates the quality of our programs using a variety of data, including documents that are deposited into student portfolios. These portfolios consist of designated student work (artifacts) from each course. Each artifact is graded and accompanied by a scored rubric that assesses the work in light of desired curricular outcomes. The designated

assessment artifact for this course is the Final Exam for MDiv and DAS students and the Leadership Paper #2 for DMin students.

We use your portfolio to assess student learning (in the aggregate) and the effectiveness of our curricula in reaching desired goals and objectives. This process does not involve any further evaluation of your work for grading purposes. No identifying information will be included in any evaluation or report provided to our accreditors or other outside parties. For further information, see the Student Handbook. You may also talk with your instructor, your advisor, the Assessment Coordinator (Lelia Fry, lfry@bexleyseabury.edu), or the Academic Dean, (Terry DeLisio, tdelisio@bexleyseabury.edu).

Learning Methodology:

The course will be taught through lecture, group activities, class discussion, assignments and assessments. These will all occur through both synchronous and asynchronous means. Assignments and assessments (quizzes) will support achievement of learning outcomes. Assignments will provide an opportunity for students to apply concepts learned through the readings, lectures and class discussions – they will be related to nonprofit organizations in general.

Course Required and Recommended Resources:

I want to note the lack of women and people of color reflected in the choice of readings here. This is, in fact, a reflection of the lack of diversity in nonprofit leadership, financial management as well as nonprofit scholarship. For the record, a few women and people of color have contributed to the Heyman book. The selection of articles includes a few women as well as an African American scholar, Robert Livingston.

Managing a Nonprofit Organization, Thomas Wolf, Free Press, 2012

Nonprofit Management 101: A Complete and Practical Guide for Leaders and Professionals, Darian Rodriguez Heyman, Ed., Wiley, 2nd Edition, 2019

The Leadership Challenge, James Kouzes and Barry Posner, Jossey-Bass, 6th Edition 2017

Strengths Finder 2.0: Discover Your Clifton Strengths, Tom Rath, Gallup Press, 2007

The Budget-Building Book for Nonprofits: A Step-by-Step Guide for Managers and Boards, Murray Dropkin, Jim Halpin and Bill LaTouche, Jossey-Bass, 2007

Required Articles, Available on Canvas:

Harvard Business Review Leadership Series:

“Top Boards Do These 4 Things Differently” by Rusty O’Kelley III and PJ Neal, February 10, 2020

“The Most Important Leadership Competencies, According to Leaders Around the World” by Sunnie Giles, March 15, 2016

“The Focused Leader” by Daniel Goleman, December 2013

“Crucibles of Leadership” by Warren Bennis and Robert J. Thomas, September 2002

“Nonprofits that empower leaders of color are more apt to do something about racial inequality”, Brad R. Fulton, *The Conversation*, December 19, 2019

The Furniture Bank by Jean Salamat, 2010, Harvard Business Review

The SBC Foundation by Diana Barrett, 2012, Harvard Business School

Moving Beyond Diversity Toward Racial Equity, Ben Hecht, Harvard Business Review, 2020

How to Promote Racial Equity in the Workplace, Robert Livingston, Harvard Business Review, September-October, 2020

Other:

[Mitt Romney on YouTube](#), February 5, 2020

<https://youtu.be/HU4bkXFHyLU> YPTC Unique Features of Nonprofit Financial Reports

<https://youtu.be/VzeJvkwSgRg> Fundamentals of Nonprofit Budgets by Propel Nonprofits

Technology:

Students are expected to access the “Tech Help” resources via the button at the bottom of the Canvas home page for a description of technology requirements.

Course Expectations and Assignments

A complete description of each assignment will be posted on Canvas. Assignments are due on the dates noted unless other arrangements are made with the instructor well in advance of the due dates.

Leadership Reflection Paper #1 (10% of grade; *Due June 7, 2021*):

A 3-5-page paper that connects what you have learned about your strengths with what you have learned about the unique and special challenges of leading a nonprofit organization.

Furniture Bank Case Study or SBC Foundation Case Study (20% of grade; *Due June 14, 2021*):

Read the case study and respond to a set of questions about the organization, its structure, finances and challenges. Draft brief written responses to each question and be prepared to discuss them during class.

Group Project (20% of grade; *Due as an in-class presentation on either June 22 or June 25.*):

Develop a budget related to a hypothetical program/organization to be outlined by the instructor. Identify sources of income as well as an expense budget that reflects the full costs of operating this entity. Each group member will have a specific role to play. Final product is a class presentation complete with slides and handouts.

Or

Individual Project (as an alternative to the Group Project) – (20% of grade; *Due as an in-class presentation on either June 22 or June 25*): Case study of a particular church’s budget, budget process etc. Interview senior pastor and perhaps Senior Warden or someone in a comparable leadership position. Present findings to class supported by slides/handouts.

Racial Injustice (10% of grade; *Due June 28, 2021*): Directions will be posted on Canvas.

Students will read the articles by Hecht and Livingston and write a reflective response to a set of related questions/topics.

Class Participation (10% of grade for DMin; 20 % of grade for MDiv students):

The class will be better and more interesting if everyone participates, and no one dominates. Class participation includes active listening, thoughtful contributions to class discussions and questions that help to clarify understanding.

Final Exam (20% of grade; *Due July 9, 2021*):

Respond to a series of questions regarding financial management of nonprofit organizations. Then, in a well-constructed narrative, address a set of questions related to a hypothetical situation that a nonprofit is facing.

Leadership Reflection Paper #2 DMin students only (10% of grade; *Due July 9, 2021*)

A 5-7-page paper that integrates the practical aspects of nonprofit organizational leadership with the principles and practices of sound theological reflection. This paper should include an overview of learning from projects/reading/discussion in class and a reflection on how to approach engaging in a relationship with a new partner nonprofit from the vantage point of your current ministry setting.

Participation in worship, while not required, is an integral part of students' formation.

Students taking the course for credit must complete the student course evaluation before they can see their course grades in Populi. Auditors are encouraged to complete the evaluation as well.

Students auditing or taking the course for CEU credit will be expected to attend all synchronous sessions and complete the written assignments and quizzes on a pass/fail basis. Participation in the group project is not required.

Course Grading & Feedback:

All assignments will be submitted in Canvas as indicated in instructions provided on the course site. If it isn't possible to submit assignments on time, students must contact the instructor in advance of the due dates to discuss alternatives.

Students will receive feedback from the instructor in Canvas within two weeks of submission of assignment.

Grading rubrics for papers and oral presentations are posted in Canvas. Based on these rubrics, the instructor will evaluate all written assignments, quizzes and exams and will provide a written assessment of strengths as well as areas for improvement. DMin students are expected to be able to more deeply and specifically link the course content with their own contexts – in other words, to demonstrate how concepts from the readings and class interactions might apply to daily life and work.

Grades will be calculated as follows:

- Leadership Reflection Paper #1 – 10%
- Furniture Bank Case Study – 20%
- Group or individual project (students may choose which they prefer) – 20%
- Racial Injustice – 10%
- Class participation – 20% MDiv students/10% DMin students
- Final exam – 20%
- Leadership Reflection Paper #2 (DMin students only) 10%

Please be aware that the Canvas gradebook reflects cumulative grades for assignments for your course, but the final official grade for the course will be recorded manually by the instructor in Populi. Students taking the course for credit must complete the student course evaluation before they can see their course grades in Populi.

Bexley Seabury requires a minimum grade of C to pass a course								
Grade	Points	Description	Grade	Points	Description	Grade	Points	Description
A (4.00)	96-100	Superior/Mastery	A- (3.67)	90-95	Excellent	B+ (3.33)	87-89	Very Good
B (3.00)	84-86	Good (high)	B- (2.67)	80-83	Good (low)	C+ (2.33)	75-79	Acceptable (high)
C (2.00)	70-74	Acceptable/Adequate						
F/NC (0)	<70	Unacceptable (Fail/No Credit)						
A grade of "P" in a Pass/Fail course is equivalent to a grade of C or above.								

Week of Tuesday, June 1st. Asynchronous reading and assessment

It is strongly suggested that students begin their reading prior to this week.

Reading: Strengths Finder 2.0

Posner and Kouzes, Chapters 1,2,3,5,7,9,11 at minimum. Entire book is recommended

Giles, "The Most Important Leadership Competencies According to Leaders Around the World"

Coleman, "The Focused Leader"

Bennis and Thomas, "Crucibles of Leadership"

Competencies:

- Increased awareness of what it means to be a leader.
- Ability to recognize an effective leader.
- Understanding of how personal experience and strengths play into leadership style and effectiveness.

Assignments:

1. Take the Strengthsfinder 2.0 Assessment, read and print your individualized report, forward a copy of the report to Deborah Hagman-Shannon (dahs23@sbcglobal.net). Due: June 5, 2021
2. Complete the Leadership Reflection Paper assignment that will be posted on Canvas. Submit your paper in Canvas by June 7th and be prepared to discuss your perspective during the first synchronous session.
3. Contribute to threaded discussions throughout the week.
4. Read materials as noted for our first synchronous session Tuesday, June 8.
5. Search the Internet for noteworthy examples of Vision/Mission/Purpose statement on church websites. Identify 2 that meet criteria for well-constructed Mission Statements, as

articulated in Dropkin's book, and post them on Canvas. Be prepared to discuss them during our session on June 11th.

Week of Monday, June 7th. Leadership Profiles, Introduction to Nonprofits and Strategic Planning

Synchronous Sessions for weeks of June 7, 14 and 21:

Tuesdays from 10 a.m. to 1 p.m. CDT

Fridays from 10 a.m. to 1 p.m. CDT

(there will be a break from 11:30-11:45 in each session)

Reading: Wolf, Chapter 1 – Understanding Nonprofit Organizations

Wolf, Chapter 9 – Planning

Wolf, Chapter 10 – Sustainability and Leadership

Dropkin, Worksheet F1 – checklist for effective mission statements

Heyman, Chapter 1 – Nonprofits in the U.S.

Heyman, Chapter 4 – Thriving as an Executive Director

Heyman, Chapter 5 - Strategic Planning: Turning a Dream into Reality

Heyman, Chapter 24 – Nonprofit Marketing: The why & how of branding

Heyman, Chapter 25 – Moving Millennials to Act: Strategies & Tactics for Marketing.

Competencies:

- Increased self-awareness with enhanced focus on strengths
- Can articulate unique features and challenges of nonprofit organizations
- Increased ability to distinguish between well-articulated strategic direction and tactics/operational activities.

Synchronous Topics:

June 8: Strengths Finder 2.0 individual and class profiles

Introduction to structure and formation of nonprofit organizations

June 11: Strategic planning, vision and mission statements

Branding and marketing

Assignments:

1. Read either the Furniture Bank Case Study or the SBC Foundation Case Study. Complete the assigned questions in a 3–5-page double spaced paper by midnight on Thursday, June 17, 2021.
2. View instructor lectures: Types of budgets; The budget cycle and budget preparation; types of revenues
3. View You Tube videos – Fundamentals of Nonprofit Budgeting and Unique Features of Nonprofit Financial Reports

4. Participate in threaded discussion topic: Of the trends noted in Chapter 1 of Heyman, note the 2 or 3 of greatest importance to churches and/or religious organizations. How do these trends impact the church? What can be done to address them?

Week of Monday, June 14th. Roles and responsibilities in nfp's. Introduction to budgets, monitoring budgets and budget modifications.

Reading: Dropkin, Exhibit C4 – Sample Budget Variance Report
O'Kelley & Neal "Top Boards Do These 4 Things Differently"
Wolf, Chapter 2 – The Board
Wolf, Chapter 6 – Financial Management
Dropkin, Chapter 1 – Why Budgets and Budgeting are Important in NFP's
Dropkin, Chapter 2 – Understanding Basic Types of NFP Budgets
Dropkin, Chapter 3 – Key Board and Staff Roles in NFP Budgeting
Dropkin, Chapter 4 – Establishing Budget Guidelines, Priorities, Goals
Dropkin, Chapter 13 – Developing Operating Budgets for Individual Units
Dropkin Chapter 14 – Major Components of Operating Budgets
Dropkin, Chapter 14 – Estimating Income and Expenses
Dropkin, Chapter 16 – Allocating Administrative, Overhead and Shared Costs
Dropkin, Chapter 17 – Revising Draft Operating Budgets
Dropkin, Chapter 18 – Zero-based Budgeting
Dropkin, Chapter 19 – Capital Budgets
Heyman, Chapter 12 – Nonprofit Financial Management

Competencies:

- Can cite distinct responsibilities for paid staff vs. Board
- Understands the types and respective purposes of nfp budgets
- Understands the concept of "full cost" budget
- Can "read" a budget actual report and articulate strategies for monitoring and addressing shortfalls in approved budget
- Can interpret budget actual reports, cash flow budgets and related formats for monitoring revenues and expenses
- Can propose strategies for maintaining a balanced budget and understands the requirements/limitations of each

Synchronous Sessions:

June 15: Roles, responsibilities and management of staff and volunteers
Types of revenues and expenses
Indirect costs

June 18: Budget development
Monitoring and modifying budgets
Understanding cash flow

Assignments:

1. View instructor videos: Fund Raising; Small Group Projects – Guidance and Expectations

2. In pairs, complete a draft budget for the Child and Family Development Center (CFDC) following the assumptions and information in the CFDC description. Construct a budget showing income and expenses and address related questions.
3. Sign up for either a group or individual final project. These projects will culminate in oral presentations to the class during our sessions on June 22 and June 25. Three people for group projects. As a group, select which of the 2 options you would like to work on.

Week of Monday, June 21st. Risk management, fund raising, small group projects

Reading: Heyman, Chapter 7 – Risk Management and Insurance
Heyman, Chapter 9 – How to Promote Diversity and Inclusion
Heyman, Chapter 10 – Nonprofit Law
Heyman, Chapter 12 – Nonprofit Financial Management
Heyman, Chapter 20 – Online Fund Raising
Heyman, Chapter 31 – Getting Your Board to Fundraise
Heyman, Chapter 32 – Volunteer Recruitment
Wolf, Chapter 8 – Fund Raising
Wolf, Chapter 10 – Sustainability and Leadership
Hecht, Ben – “Moving Beyond Diversity and Toward Racial Equity”
Livingston, Robert – “How to Promote Racial Equity in the Workplace”

Competencies:

- Increased understanding of fund-raising challenges for churches and religious organizations in the context of general nonprofit fund raising.
- Understands the concept of “risk” related to operations and financial management

Synchronous Sessions:

June 22: Types of risk, strategies for managing risk
Group/individual presentations

June 25: Fundraising
Group/individual presentations

Assignments:

1. Complete your individual or group project following instructions as posted on Canvas. Submit power point slides and back-up documentation to the instructor via Canvas prior to your presentation date, which will be either June 22 or June 25.
2. Write and submit your written reflections on racial justice, in a 4–6-page paper, according to instructions posted on Canvas. Paper is due on June 28th.

Final assignments:

1. Complete the Final Exam questions as posted on Canvas and submit no later than July 9, 2021.

2. For DMin students, complete Leadership Reflections #2 according to instructions posted on Canvas. Submit by July 9, 2021.

Academic Policies

All students in Bexley Seabury courses are expected to be familiar with the following information that is provided on Canvas, in Student Resources:

- Academic policies and forms
- Requests for withdrawals, extensions, and incompletes
- Technological requirements and assistance
- Writing guidelines and assistance
- Course etiquette
- Prohibition of plagiarism