



**The REACH Program of  
Trinity International University**

**BUS 371R**  
**Board Governance and Volunteer  
Management**

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Student's Manual 1.1

2065 Half Day Road  
Deerfield, IL 60015  
847-317-6500  
[www.tiu.edu/reach](http://www.tiu.edu/reach)

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## Table of Contents

<b>I. Course Description</b> .....	4
<b>II. Course Overview</b> .....	4
<b>III. Course Materials</b> .....	4
<b>IV. Course Policies</b> .....	5
<b>V. Course Outcomes</b> .....	6
<b>VI. Course Requirements</b> .....	7
<b>VII. Grading Scale</b> .....	7
<b>VIII. Course Schedule</b> .....	8
Session One Overview .....	8
Outcomes for Session One .....	8
Assignments Due for Session One .....	8
Session Two Overview .....	9
Outcomes for Session Two .....	9
Assignments Due for Session Two .....	9
Session Three Overview .....	10
Outcomes for Session Three .....	10
Assignments Due for Session Three .....	10
Session Four Overview .....	11
Outcomes for Session Four .....	11
Assignments Due for Session Four .....	11
Session Five Overview .....	12
Outcomes for Session Five .....	12
Assignments Due for Session Five .....	12
Session Six Overview .....	13
Outcomes for Session Six .....	13
Assignments Due for Session Six .....	13
<b>IX. Course Documents</b> .....	14
Session One Documents .....	14

Session Two Documents.....	20
Session Three Documents.....	23
Session Four Documents.....	26
Session Five Documents.....	29
Session Six Documents.....	31
<b>X. Evaluation Forms</b> .....	33
Instructor Evaluation for Written Work.....	33
Instructor Evaluation for Oral Presentations.....	35

## I. Course Description

This course studies the selection, roles, and responsibilities of the board of directors in nonprofit organizations. A particular emphasis is given to understanding the relationship between the organizational executive and the board in addressing managerial challenges. It also addresses the theory and principle of the management of volunteers in a variety of nonprofit settings.

## II. Course Overview

“People are definitely a company’s greatest asset. It doesn't make any difference whether the product is cars or cosmetics. A company is only as good as the people it keeps.”

- Mary Kay Ash

Every nonprofit organization depends on the passion, commitment and expertise of its people to become and remain successful in its mission. While offering professional development activities to every member of the organization is the ideal, providing professional development to the Board of Directors and the Executive Director is essential.

Fulfilling the vision of the organization’s founders requires the practical and exceptional exercise of board governance and volunteer management. The best of leadership and business management should be applied to the task of administering a nonprofit board and its volunteer program.

Each session of the course lays the foundation for understanding the requirements for ensuring that a nonprofit board is properly organized and its core functions identified. The editorial team at Jossey-Bass publishers takes students through the process of developing board structures and recognizing their financial responsibilities in the organizational lifecycle and change management. Tracy Daniel Connors explains the critical role of volunteer administration and the theories of organizational behavior that help volunteer managers build a first-class volunteer team.

This course delves deeper in nonprofit organization management. Leaders will find value in the practical questions asked about board governance and volunteer management. These questions can serve as the foundation for developing a program of continuous improvement in the nonprofit and for establishing checkpoints for thinking about organizational change.

## III. Course Materials

### 1. Required

- a. BoardSource (2007). *The nonprofit board answer book*. (2<sup>nd</sup> ed.)
- b. Connors, T. D. (ed.), (1995). *The volunteer management handbook*.
- c. The Bible (preferably the ESV – or the NASB, RSV, NRSV, or NIV)

## 2. Recommended

- a. Carson, M, & Donohoe, M. (2003). The executive director's survival guide: Thriving as a nonprofit leader. Jossey-Bass. Inc., Somerset, NJ

## IV. Course Policies

### 1. APA Documentation

All written work (e.g. worksheets/essay questions, reflection papers, final projects, etc.) in the REACH Program must conform to the APA parenthetical notation style. This includes:

- an APA title page (including a running header and page number)
- an “Abstract” page with a 1-2 paragraph summary of your paper (an abstract is only necessary for your Applied Learning Papers, but not for your smaller assignments)
- In-text citations (with author(s), date, and page number (if applicable))  
Note Well: Even discussion board postings and PowerPoint presentations, for example, must use in-text citations when you cite another person’s work or ideas.
- a “References” page (it is not called a “bibliography”)
- one inch margins
- 12 point font
- double spaced

Failure to use and cite others’ work or ideas properly will lead to charges of academic dishonesty. See below for more information.

### 2. Academic Integrity

As a member of the Trinity community, we ask you to hold yourself and others to the highest standards of academic integrity and honesty. Violations take many forms, which include, but are not limited to, the following:

- Plagiarism: using another’s work or ideas without proper documentation, which requires citing the author or authors’ name(s), date of publication, and page number (if applicable)
- Cheating: using notes, books, or crib sheets during closed-book quizzes or exams, or copying from another’s student’s work
- Submitting Previous Work: submitting your work that was previously turned in for credit
- Ghosting: writing a paper or taking a quiz (or any other evaluation) in place of another student
- Aiding and Abetting: helping others to commit acts of academic dishonesty, or failing to report those who have or plan to commit dishonest acts

Faculty members will investigate all violations of academic integrity, whether deliberate or non-deliberate. If a violation is confirmed, the student may receive an “F” for the assignment and the course. In such a case, the student may not drop the course. The faculty member will document the case of dishonesty, explaining the incident and the

action taken. The Associate Dean will receive a copy of this report, and a copy will be placed in the student's file. In serious cases of academic dishonesty, the Associate Dean may choose to meet with the student and faculty member to review the case. Multiple violations may lead to a student's dismissal from the program.

### 3. Late Work

All assignments must be turned in on or before the date they are due. Any assignment turned in late will be deducted as follows:

- a. 10% off for up to 24 hours late
- b. 20% off for up to 48 hours late
- c. assignments more than two days late will receive a zero

An extension on the time needed to submit final course requirements (such as the ALP) will be granted only in unusual circumstances and if the instructor and the Associate Dean grant the request.

### 4. Attendance Policy

Because of the accelerated and collaborative nature of the REACH courses, students are required to attend every class session. Missing a single class means a significant portion of contact with the instructor and the learning community has been lost.

For face-to-face courses, students missing one class session will be penalized between one-half and one full letter grade. Students missing two class sessions will receive an "F" for the course. Any student missing more than 30 minutes of a course session will be considered absent for the full course session.

For online courses, students must participate actively in class discussions and activities. Failure to do so will result in a grade reduction of one-half to a full letter grade at the discretion of the instructor.

### 5. Basic Writing and Speaking Proficiency

The REACH Program expects you to maintain basic standards of writing and speaking proficiency. If you believe you need support in one or both areas, please contact your academic advisor and/or use the resources in the following section.

## V. Course Outcomes

At the end of this course, the students will be able to:

1. Summarize all the major functions of the Board of Directors in a nonprofit organization
2. Explain the structure of the nonprofit Board of Directors
3. Describe the selection and development process as it pertains to a Board of Directors
4. Recognize the importance of Board and Committee meetings in a nonprofit organization
5. Summarize the Board of Directors role as a fiduciary

6. Discuss the nuances and challenges inherent in the relationship between the nonprofit Board of Directors, the Chief Executive, and the nonprofit organization's Staff
7. Describe the dynamics of change in a nonprofit organization as it moves through various stages of its organizational lifecycle
8. Summarize what motivational theories help with recruitment, retention, rewards, and ongoing support of nonprofit volunteers
9. Describe the various tools and techniques essential to effective management of volunteers

## VI. Course Requirements

1. Weekly Chapter Study Questions	240 points
2. Weekly Journal and Final Journal	120 points
3. Weekly Field Report and Final Field Report	120 points
4. Class Participation	120 points
<hr/>	
<b>Total Possible Points</b>	<b>= 600 points</b>

## VII. Grading Scale

Your final course grade will be based on the total number of points that you earn throughout the course:

Percentage	Grade
92-100	A
90-91	A-
88-89	B+
82-87	B
80-81	B-
78-79	C+
72-77	C
70-71	C-
68-69	D+
62-67	D
60-61	D-
0-59	F

## VIII. Course Schedule

### Session One Overview

#### Outcomes for Session One

“At the end of this session, the student will be able to...”

1. Describe the basic roles and responsibilities of a nonprofit organization’s (NPO’s) Board of Directors
2. Describe the role and responsibilities of the nonprofit’s Chief Executive
3. Explain the working relationship between the Board and the Chief Executive in a NPO
4. Recognize the difference between a mission statement and a vision statement
5. Evaluate the place of the six theories of motivation in an NPO manager’s toolkit

#### Assignments Due for Session One

1. Text: *The Nonprofit Board Answer Book*
  - Read Question and Answer (QA) numbers: Intro, QA-1 through QA-15
  - Answer questions selected (see course documents)
2. Text: *The Volunteer Management Handbook*
  - Read Chapters: Preface, 1, 2, 3
  - Answer all questions (see course documents)
3. Complete field report findings (share in-class)
4. Complete weekly journal (written in-class)

## Session Two Overview

### Outcomes for Session Two

“At the end of this session, the student will be able to...”

1. Understand how committees assist the Board of Directors
2. Explain the role of advisory councils in NPO operations
3. Discuss how to resolve issues that occur between the Chief Executive and the Board
4. Explain the variations in the election/selection process for NPO leader/managers
5. Discuss the value of having a New Board Member Orientation List
6. Determine the key tasks required to launch a volunteer recruit effort
7. Explain the benefits of having written policy statements to help manage the NPO and its volunteer staff

### Assignments Due for Session Two

1. Text: *The Nonprofit Board Answer Book*
  - Read QA numbers: QA-16 through QA-30
  - Answer questions selected (see course documents)
2. Text: *The Volunteer Management Handbook*
  - Read Chapters: 4 and 7
  - Answer all questions (see course documents)
3. Complete field report findings (share in-class)
4. Complete weekly journal (written in-class)

## Session Three Overview

### Outcomes for Session Three

“At the end of this session, the student will be able to...”

1. Describe the appropriate actions to take to re-engage an inactive Board member
2. Explain the “staggered systems” of Board service and its benefits to the NPO
3. Explain the value of the “sunshine laws”
4. Discuss the importance of well-thought-out meeting agendas
5. Identify the origins of reports and briefings required by the NPO Board
6. Understand how decision-making is carried out in the boardroom of a NPO
7. Identify the technologies that can assist the Board with communicating
8. Explain the role and responsibilities of a formal volunteer administrator

### Assignments Due for Session Three

1. Text: *The Nonprofit Board Answer Book*
  - Read QA numbers: QA-31 through QA-46
  - Answer questions selected (see course documents)
2. Text: *The Volunteer Management Handbook*
  - Read Chapter 8
  - Answer all questions (see course documents)
3. Complete field report findings (share in-class)
4. Complete weekly journal (written in-class)

## Session Four Overview

### Outcomes for Session Four

“At the end of this session, the student will be able to...”

1. Describe the role of a fiduciary
2. List the basic areas of good business practice that will help NPO’s develop a sound financial base
3. Explain the need for and benefits of having financial reserves
4. Discuss how NPO’s can partner with other organizations/businesses to help create new revenue streams
5. Describe how NPO boards manage their funds when the financial reports so a profit
6. Explain how state laws protect NPO board members from the full impact of lawsuits
7. Evaluate course learnings to-date and discuss how a Christian heritage and believe system influences leadership and innovation in NPO’s

### Assignments Due for Session Four

1. Text: *The Nonprofit Board Answer Book*
  - Read QA numbers: QA-47 through QA-58
  - Answer questions selected (see course documents)
2. Text: *The Volunteer Management Handbook*
  - Read Chapter: 11
  - Answer all questions (see course documents)
3. Complete field report findings (share in-class)
4. Complete weekly journal (written in-class)

## Session Five Overview

### Outcomes for Session Five

“At the end of this session, the student will be able to...”

1. Recognize the key areas which a chief executive is responsible for managing in a NPO
2. Discuss the board of directors’ responsibilities in human resource management practice and policy
3. Recognize the wealth resources available on the internet to help support NPO’s in their quest to meet their goals and accomplish their mission.  
Discuss traditional management practices that are essential to managing volunteers

### Assignments Due for Session Five

1. Text: *The Nonprofit Board Answer Book*
  - Read QA numbers: QA-59 through QA-70
  - Answer questions selected (see course documents)
2. Text: *The Volunteer Management Handbook*
  - Read Chapter: 13
  - Answer all questions (see course documents)
3. Complete field report findings (share in-class)
4. Complete weekly journal (written in-class)

## Session Six Overview

### Outcomes for Session Six

“At the end of this session, the student will be able to...”

1. Recognize the lifecycle stage of an organization.
2. Describe how NPO leaders might move the organization out of a stagnation point
3. Explain how a transitioning leadership crisis can be avoided
4. Discuss the value of building strategic alliances with another organization
5. Explain the acceptability of NPO lobbying by the IRS
6. Determine the most immediate and greatest potential source of donors for a NPO
7. Describe the various types of fund-raising activities that generate income for NPO's
8. Discuss basic marketing methods NPO's can use to communicate with their clients, customers, constituents, and donors

### Assignments Due for Session Six

1. Text: *The Nonprofit Board Answer Book*
  - Read QA numbers: QA-71 through QA-80
  - Answer questions selected (see course documents)
2. Text: *The Volunteer Management Handbook*
  - Read Chapter: 12
  - Answer all questions (see course documents)
3. Final Field Report findings (share in-class; instructor will collect)
4. Final Weekly Journal (last comments hand-written in-class; instructor will collect)

## IX. Course Documents

### Session One Documents

Text: *The Nonprofit Board Answer Book*

Chapter(s) / QA number(s): Introduction to the book, QA-1 through QA-15

Pages: xiii – xviii, 3 – 57

*Please answer seven (7) of the following question from the required reading.*

1. Explain the differences between the following Internal Revenue Service (IRS) nonprofit designations: 501(c)3, 501(c)4, and 501(c) 6.  
Add this document to your resources: <http://www.irs.gov/pub/irs-pdf/p4220.pdf>
2. In what ways are nonprofit and for profit boards (and their organizations) similar? How are they different; i.e., what is the primary focus of each?
3. Name four reasons why the chief executive's (the Executive Director) position has evolved into a more challenging and more responsible position?
4. Explain the basic nature of the relationship of the Chief Executive to the nonprofit organization's Board of Directors.
5. Why should the nonprofit organization's (NPO's) Board be careful in its choice of a chief executive?
6. Describe the ten basic responsibilities of NPO boards. Which two responsibilities do you think are most important among the ten? Why?
7. Which leader in the NPO is responsible for moving the organization toward achieving its mission and goals?
8. Who is charged with the task of managing the work of the Board of Directors, and who is charged with the task of managing the organization's other staff?
9. Describe the role of a committee and the role of a task force.
10. Why should Board members be thoughtfully selected, oriented, and trained?
11. What is the core difference between a mission statement and a vision statement?
12. Identify the core characteristics of a well-developed mission statement, and explain how those characteristics are helpful to the Board.

Text: *The Volunteer Management Handbook*  
 Chapter(s): Preface, 1, 2, 3  
 Pages: xix – xxiii, 3 – 60

*Please answer the following question from the required reading.*

1. Name the six theories of motivation that can help managers recognize what motivates volunteers for NPO's.
  - a. \_\_\_\_\_
  - b. \_\_\_\_\_
  - c. \_\_\_\_\_
  - d. \_\_\_\_\_
  - e. \_\_\_\_\_
  - f. \_\_\_\_\_
  
1. What is altruism and why would it be significant to managers/leaders of NPO's?
2. Explain V.I.E as a possible motivational process that might be used by people considering a volunteer role in a NPO?
3. What is the argument for and against reinforcement theories as a tool for managers of volunteers?
4. According to Maslow, what unmet need would most likely motivate a former Fortune 500 executive to volunteer his/her personal time, energy, and resources?
5. Under Herzberg's theory, how might a volunteer organization identify a volunteer's motivation to serve?
6. When or if you volunteer to work in a NPO, which Learned Needs category would you most likely identify with? Briefly describe why?

Review: <http://www.usafreedomcorps.gov> and <http://www.volunteer.gov/gov/> and <http://www.americaspromise.org/APA.htm>

## Weekly Journal Reports and Final Journal Report

Keep a weekly journal of personal engagement with the course materials, classmates, and the instructor. Entries need to be in the journal at the end of the class session each week. The instructor will provide an opportunity for you to complete your handwritten or computer-based journal during the last hour of sessions one through five. A final journal report is to be handed in during session six.

Its primary evaluation will be based on complete and logical sentences that express your questions and/or learnings. There are no minimum or maximum numbers of pages to the journal – but you should strive to write at least one page per week. Be sure to place dates in your journal. The final journal report is a compilation of all the weekly journals. Be sure to include a cover page. Number each page in the journal document. Use APA format. The journal is due week / session six.

You might find it helpful to create two columns on your draft journal page:

**Column 1 headings:** Topic / Issue / Concern / Concept / Theory / Problem.

*For example:* “Where can I learn more about the legal issues associated with incorporation?”

**Column 2 heading:** My Commentary.

*For example:* “In the lecture I heard I can log on to irs.gov to become familiar with the IRS codes for 501(c) 3. What about legal counsel on the Sarbanes-Oxley requirements? Janice mentioned that her NPO belongs to a legal support network that has good attorneys with below market fees. I’ll check with her later.”

**Here are a few questions you can use to invigorate your journaling:**

- What does this topic mean to me?
- What did I learn from the demonstration/discussion/presentation/lecture?
- How did the demonstration/discussion/presentation/lecture help me understand?
- What terms/concepts/theories do I need to know?
- I do not understand this:
- I am glad I learned about:
- What I thought before reading. / What I think after reading.
- What methods are available to solve the problem? How was the problem solved?
- What problems did I encounter during reading? How was the problem solved?

## Weekly Field Reports and Final Field Report

### **Purpose:**

To become fully engaged in this course, you will need quickly to identify three nonprofit organizations where you have some level of interest and/or affiliation. Make sure you have a key contact person in each of your three organizations that can help you gather the data. You only need one nonprofit organization to complete this assignment. The other two are “fall-back” organizations. They will be available if you cannot get information from your primary organization.

### **Requirements for the weekly field report:**

The 22 items listed next are to be included in your report. Each week, you are to share with the class and the instructor the progress you have made on collecting data on your organization. At the conclusion of session six, all the weekly reports are to be placed in a folder and turned in to the instructor. Evaluation is based on the completeness of the data that you were able to gather. Therefore, answer in complete and logical sentences. Add comments if clarity is needed for the reader. There is no minimum or maximum page number requirement for final field report. You must use the **Request for Permission to Collect Data** form immediately as you select your organization.

1. Name of the organization
2. (a) Website address and (b) key contact for field report data gathering
3. Number of Years the Organization has been in operation and Year started
4. Who are the founders?
5. Name the leaders (Board of Directors, Board Chair, Chief Executive, etc.)
6. What is the organization’s vision and mission?
7. What kind of education and experience do the leaders bring to the organization?
8. Does the organization have legal counsel? Is it someone in the organization?
9. Does the organization have a CPA or financial auditor? Is it someone in the organization?
10. How many people volunteer to work for the organization?
11. For what jobs are the volunteers recruited?
12. How are volunteers recruited?
13. Who manages the volunteers?
14. Is there a professional development program for the leaders? Please describe.
15. Is there a professional development program for the volunteers? Please describe.
16. Does the Board of Directors report to another leader?
17. Who serves in the role of chief executive?
18. Has the organization allowed the creation of an executive committee?
19. If the organization is an **Illinois** nonprofit corporation, locate and print its profile from the Illinois corporation database. Go to: <http://www.ilsos.gov/corporatellc/>  
If the organization is a **Wisconsin** nonprofit corporation, locate and print its profile from the Wisconsin corporation database. Go to: <http://www.wdfr.org/apps/CorpSearch/Search.aspx?>  
If the organization is an Indiana nonprofit corporation, locate and print its profile

- from the Indiana corporation database. Go to:  
[https://secure.in.gov/sos/bus\\_service/online\\_corps/name\\_search.aspx](https://secure.in.gov/sos/bus_service/online_corps/name_search.aspx)
20. Are the leaders familiar with the concept of “social entrepreneurship” and “social enterprises?” If so, describe their understanding.
21. A short list of organizations to contact:
- <http://www.bwm.org>
  - <http://www.litworks.org>
  - <http://oprahangelnetwork.org>
  - <http://www.learningpt.org>
  - <http://www.pavingtheway.net>
  - <http://www.scj-usa.org>
  - <http://www.evancfa.org>
  - <http://www.irim.org>
  - <http://www.adlerplanetarium.org>
  - <http://www.how-inc.org>
  - <http://gateway.northpark.edu/about>
  - <http://www.chicagononprofit.org>

TRINITY INTERNATIONAL UNIVERSITY

REACH \* 2065 Half Day Road, Deerfield, IL 60015 \* 847-317-6500

BUS371R – Board Governance and Volunteer Management

**Request for Permission to Collect Data**

- Student Name
- 

- Requesting Permission from {Company or Organization Name and Address}
- 

- Why data is Needed: To meet course study requirements on Nonprofits, Board Governance, and Volunteer Management

- Summary of Data Needed
- 
- 

- Student Signature:

Date

---

*Provide Printed Name and Signed Name*

**Permission Granted:**

The above named student has permission to collect, from our organization, the data mentioned as a part of his/her educational requirement at Trinity International University. I understand that the material will be kept confidential and will not be used for any other purpose without the written notification and consent of our organization.

- Authorized by

Date

---

*Provide Printed Name and Signed Name*

- Job Title

Phone

- 
- Address
-

## Session Two Documents

Text: *The Nonprofit Board Answer Book*

Chapter(s) / QA number(s): QA-16 through QA-30

Pages: 58 – 115

*Please answer seven (7) of the following question from the required reading.*

1. How do committees help the Board?
2. What personal traits should a committee chairperson possess if his/her committee is going to be effective and efficient?
3. Describe the function of an executive committee. Who should chair the executive committee?
4. Why might advisory councils be a positive resource to a NPO? What are the risks involved with establishing advisory councils?
5. What legal obligations does the Board Chair have to the NPO?
6. List the key duties of a Board Chair of a NPO.
7. What may cause the relationship between the Board Chair and the Chief Executive to become adversarial?
8. How would you resolve an instance when the Founder of the NPO wants to be the Executive Director and the Chairman of the Board?
9. What entity defines the required minimum number officers that a NPO uses in its operations?
10. What is the benefit of having a Chair-elect office in the NPO?
11. When might an uncontested slate be used instead of an election process?
12. Review the Exhibit 23.1 – Board Member Profile. Ask a board member of a NPO (you are familiar with) about the usefulness of such a profile. Write down his/her comments to share with the class.
13. Why should chief executives be prohibited from voting on who is elected to the NPO Board of Directors?
14. What is the difference between a contested and an uncontested ballot in Board election process?

15. Name several benefits of having a diverse Board of Directors? How can this diversity take place?
16. Review the Exhibit 28.1 – New Board Member Orientation Checklist. Ask a board member (of a NPO you are familiar with) about the usefulness of such a profile. Write down his/her comments to share with the class.
17. Describe the benefits and the risks of having members of the same family serving on the Board of Directors of a NPO. List the occasions when family boards are a preferred.

Text: *The Volunteer Management Handbook*  
Chapter(s): 4 and 7  
Pages: 61 – 81; 125 – 155

*Please answer the following question from the required reading.*

1. What four tasks must be completed before engaging in a volunteer recruitment effort?
2. When you are looking for volunteers to help staff your NPO, what three questions should you always ask as you embark on recruiting volunteers?
3. Is there any advantage of having a volunteer job application? Explain your answer.
4. How can a NPO avoid putting at risk its clients who are most vulnerable to the potential aberrant behaviors of volunteer staff?
5. Name the top five activities that you think volunteer managers should facilitate to retain their volunteer team.
6. What benefits do written policies have for a NPO?
7. When writing policy statements, why is it important to consider “rounding the edges?”

## Session Three Documents

Text: *The Nonprofit Board Answer Book*

Chapter(s) / QA number(s): QA-31 through QA-46

Pages: 116 – 174

*Please answer seven (7) of the following question from the required reading.*

1. If you were Board Chair, what action(s) would you take to address an uninvolved board member?
2. In what ways do you think a Board Alumni Council can benefit the NPO and former board members?
3. Why is a “staggered system” of Board service helpful to an organization?
4. Think of at least three ways former board members and Chief Executives can be involved with the NPO after their term has ended. What potential risk arises if a Board Chair or Chief Executive returns to head a standing committee or the executive committee?
5. What is a best practice policy regarding compensation for service while serving at a nonprofit organization?
6. Explain the value of the “sunshine” laws.
7. In general, how often should a board meet?
8. What are some features of a good meeting?
9. In what way is a board retreat different from a traditional board meeting?
10. Why would you invite a board trainer to a board meeting?
11. Talk about the potential risk when a prospective donor is invited to a board meeting.
12. Which group of people usually prepares reports and briefings for the Board of a NPO? Who is responsible for reviewing these reports and briefings before being received by the Board?
13. Which practice of board decision-making (voting) do you prefer? Why? (See the following site for an unofficial discussion of Roberts Rules of Order: <http://www.robertsrules.org>)

14. Why is the recording, approval and storage of the Board minutes so important to manage?
15. List the technologies that can help NPO Boards improve communications and meetings.

Text: *The Volunteer Management Handbook*

Chapter(s): 8

Pages: 156 - 186

*Please answer the following question from the required reading.*

1. Why has the role of the volunteer administrator become such an important factor in NPO's who want to maximize effectiveness and efficiency?
2. Review Exhibit 8-1 Core Elements of Volunteer Administration. Talk to a leader of a NPO and share this list with him/her. Ask if such a list helps manage their NPO's team of volunteers.
3. Review the following websites:
  - The Council for Certification in Volunteer Administration at: <http://www.cvacert.org>; - - The World Volunteer Web at <http://www.worldvolunteerweb.org>;
4. Is it better to perform a targeted recruitment with a pool of already identified volunteers, or is it better to perform a general recruitment? Explain your answer.
5. Why is creating a job description for a volunteer role so important in the volunteer administration process?
6. In what ways can a NPO honor a volunteer through a recognition program?
7. Briefly explain the volunteer administrator's responsibilities in relationship to:
  - record keeping
  - program evaluation
  - volunteerism education and advocacy

## Session Four Documents

Text: *The Nonprofit Board Answer Book*

Chapter(s) / QA number(s): QA-47 through QA-58

Pages: 177 – 228

*Please answer seven (7) of the following question from the required reading.*

1. What is a fiduciary?
2. What basic areas of good business practice should a NPO focus on if they desire a sound financial future?
3. What NPO are you aware of that have partnered with businesses to help generated multiple revenue streams? See <http://www.faithworks.info/Standard.asp?id=4248>; <http://www.bwm.org/covenant> ; <http://www.josephcenter.com/business>
4. What are the fundamental benefits of having reserves?
5. What is generational equity?
6. List the investment guidelines that can be used by a NPO board as it seeks to maximize the use of its revenue?
7. How must NPO boards manage their budgetary actions when there is a profit indicated in the financial reports?
8. Why should a NPO board welcome an annual financial audit?
9. What steps can a board take to minimize the NPO's risk of becoming a victim of financial fraud?
10. How do a conflict-of-interest policy and a disclosure statement protect a nonprofit from the possibility of losing its nonprofit status?
11. In what fundamental way does state law protect board officers and directors from the full impact of lawsuits filed against the NPO in which they are member-leaders?
12. According to legal experts, nonprofit organizations encounter lawsuits in what area of operation? Ask a leader in a local NPO if they have legal counsel and if they maintain a checklist of best practices to follow to avoid litigation.
13. What is a form 990 and who is responsible for completing the form accurately?

14. What liability exists if a NPO operates a profit-generating business as part of its corporate function? What beneficial solution exists for a NPO that wants to continue its for-profit operation to generate additional revenue through products and/or services?

Text: *The Volunteer Management Handbook*  
Chapter(s): 11  
Pages: 222 – 243

Review Employee Volunteer information at these companies:

- <http://nationalservice.gov>;
- <http://www.unv.org/en/what-we-do/thematiques/agriculture/doc/kraft-foods-expands-partnership.html>
- <http://www.kraft.com/About/community-involvement>
- [http://www.abbott.com/global/url/pressRelease/en\\_US/60.5:5/Press\\_Release\\_0550.htm](http://www.abbott.com/global/url/pressRelease/en_US/60.5:5/Press_Release_0550.htm)
- <http://www.microsoft.com/About/CorporateCitizenship/US/CommunityInvestment/EmployeeEngagement.aspx>

Please answer the following question from the required reading.

1. As you read chapter 11, take notes on points you wish to remember because of their applicability to a role, responsibility or interest you have in a nonprofit in which you are involved.

Then, write a two-page paper on the ideas and concepts from the course lectures and discussion that are most helpful to you. Integrate prior learnings and your Christian perspectives into the paper. Be prepared to share this paper with the class and to pass in to the instructor.

## Session Five Documents

Text: *The Nonprofit Board Answer Book*

Chapter(s) / QA number(s): QA-59 through QA-70

Pages: 231 – 275

1. What is a chief executive officer responsible for in a NPO?
2. Describe the Board's responsibilities in the area of human resource management practice and policy?
3. List the five key questions that board members and NPO staff members should be asking about their individual responsibilities and roles in the organization.
4. See Exhibit 66.1: review the distinct roles of the board and the chief executive officer. Are there questions you have about this leadership arrangement? Write those questions down for discussion during class time.

### **Complete the General Research Project:**

The project requires you to provide the following information for the organizations listed below:

1. The name and stated purpose of the organization
2. The leaders of the organization and their title
3. A brief commentary about the organization (in links such as About Us, Our Team, etc.)
4. Is this a membership organization? How much is the membership fee?

Organizations to research: Come to class prepared to share your findings.

1. <http://www.ksghauser.harvard.edu>
2. <http://www.columbia.edu/cu/lweb/eresources/databases/2149776.html>
3. <http://www.guidestar.org/>
4. <http://www.idealists.org/>
5. <http://www.ncna.org/>
6. <http://www.usa.gov/Business/Nonprofit.shtml>
7. <http://www.leagueworldwide.org>  
<http://www.learningtogive.org/religiousinstructors/index.asp>
8. <http://foundationcenter.org/>
9. <http://www.arnova.org/>
10. <http://vppartners.org/index.html>

Text: *The Volunteer Management Handbook*  
Chapter(s): 13  
Pages: 259 – 289

*Please answer the following question from the required reading.*

1. Administrators and managers of volunteer programs must plan around the interests, needs, and concerns of what three stakeholder groups?
2. Why is it important for a volunteer administrator or manager in a nonprofit organization to have the skills to “assess the vested interests, needs, and expectations of a stakeholder group?”
3. Review Exhibits 13-3 and 13-4; Sample Constituents of Stakeholder Groups and Sample Stakeholder Interests. Why is this collection of data helpful to a NPO volunteer manager?
4. Review Exhibit 13-7: Form of Employer support for Volunteerism List the types of employer support. Which forms commit the greatest degree of employer resources and support?
5. What are the four steps to approaching a corporation for a volunteerism partnership? Which step do you suppose to be the most important or the most challenging in the process?

## Session Six Documents

Text: *The Nonprofit Board Answer Book*

Chapter(s) / QA number(s): QA-71 through QA-70

Pages: 279 – 317

1. Describe the life cycle of organizations. In which stage in the organizational lifecycle can stagnation occur, and what can be done to move the organization out of stagnation?
2. How could the exodus of the founder(s) from the NPO cause a leader crisis? Briefly explain how such a crisis can be avoided.
3. Why would a NPO participate in a strategic alliance with another organization? What kind of alliances do you think local churches could benefit from?
4. Review the questions NPO boards should ask themselves about strategic alliances, partnerships, mergers, and acquisitions. Which questions would be your top five to bring up in a Board and staff discussion? Why?
5. Name several reasons why a NPO would extend its operations internationally.
6. Why is it important to understand the law and the IRS code before engaging in the practice of lobbying?
7. Why would NPO leaders develop and document “what-if” scenarios for its strategic plans and for its span of daily operations?
8. What value do outside consultants bring to a NPO?
9. What can be done to reverse the decline of a NPO as it approaches the “death” stage in its organizational lifecycle? What are the NPO’s board responsibilities if the NPO must cease operations permanently?

Text: *The Volunteer Management Handbook*  
Chapter(s): 12  
Pages: 244 - 258

*Please answer the following question from the required reading.*

1. What group of people is a major source of potential donors?
2. Briefly discuss/describe the primary sources of funds for nonprofit organizations.
3. Of the various types of fund-raising activities from private/non-governmental sources, which activities are the most lucrative and which are more difficult in terms of generating funds for the NPO?
4. Why is training volunteers for the task of fund-raising an important policy and process?
5. Which methods of marketing have you engaged to promote a NPO's mission, vision, and products and/or services? Of the five methods noted in your book, which one has worked most successfully for you?

**X. Evaluation Forms****Instructor Evaluation for Written Work**

<b>Student's Name</b>	<b>Course Number</b>	<b>Assignment</b>
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<b>Specific Requirements</b>	<b>Percentage Distribution Determined by Instructor</b>	<b>Percentage Earned by Student</b>	<b>Instructor Comments</b>
<b>Organization</b> <ul style="list-style-type: none"> <li>▪ Introduction<sup>1</sup> and Conclusion<sup>2</sup></li> <li>▪ Section Titles<sup>3</sup></li> <li>▪ Section Introductions and Conclusions<sup>4</sup></li> <li>▪ Organizing Words, Phrases, and Sentences</li> </ul>	10	<input type="text"/>	▪
<b>Research / Sources (pp. 91-102<sup>5</sup>)</b> <ul style="list-style-type: none"> <li>▪ Credibility (academic vs. non-academic)</li> <li>▪ Number of Supporting Viewpoints</li> <li>▪ Number of Opposing Viewpoints</li> <li>▪ Primary Research</li> </ul>	10	<input type="text"/>	▪
<b>Discipline-Specific Knowledge/Content</b> <ul style="list-style-type: none"> <li>▪ Explanation (restate, define, describe, illustrate)</li> <li>▪ Analysis (reasons, causes, effects, purposes)<sup>6</sup></li> <li>▪ Critique (agree, disagree, strengths, weaknesses)</li> <li>▪ Synthesis of Existing Ideas and/or Theories</li> </ul>	25	<input type="text"/>	▪
<b>Discipline-Specific Application</b> <ul style="list-style-type: none"> <li>▪ Contextualization (individual, group, organization, sub-culture, culture, etc.)</li> <li>▪ Recommendations (stop, start, continue, modify)</li> <li>▪ Creation of New Ideas and/or Theories</li> </ul>	25	<input type="text"/>	▪
<b>Christian Worldview (and Other Worldviews)</b> <ul style="list-style-type: none"> <li>▪ Use of Scripture (interpretation and application)</li> <li>▪ View of Scripture</li> <li>▪ View of God, gods, or Ultimate Reality</li> <li>▪ View of Humanity</li> <li>▪ View of Birth, Life, Redemption, &amp; Death</li> <li>▪ View of Creation/Origin, History, the Present, &amp; the End Times</li> <li>▪ View of Knowledge</li> <li>▪ View of Ethics</li> </ul>	10	<input type="text"/>	▪
<b>Documentation (pp. 155-195)</b> <ul style="list-style-type: none"> <li>▪ APA Paper Format</li> <li>▪ APA Title Page (with Header) &amp; Abstract</li> <li>▪ APA Integration of Sources<sup>7</sup></li> <li>▪ APA "References" Page</li> </ul>	10	<input type="text"/>	▪
<b>Composition (pp. 1-90)</b> <ul style="list-style-type: none"> <li>▪ Clarity and Concision</li> <li>▪ Grammar, Punctuation, and Mechanics</li> <li>▪ Voice (Academic vs. Non-academic)</li> <li>▪ Tone (Assertive vs. Passive or Aggressive)</li> </ul>	10	<input type="text"/>	▪

Total Possible	Total Percentage Earned by Student	Total Possible Points for Assignment	Total Points Earned	Final Grade for Assignment
100%		x	=	

### Explanatory Notes

<sup>1</sup> An effective introduction: (1) grabs attention through a quote(s), statement(s), statistic(s), question(s), and/or story, (2) states the thesis or claim (which needs to be clear, concise, arguable, & controversial(?)), and (3) previews/outlines the paper.

<sup>2</sup> An effective conclusion: (1) summarizes the paper and ties its main points together and (2) ends with final thought(s), question(s), quotation(s), warning(s), challenge(s), and/or action points.

<sup>3</sup> Section titles are often as follows: Title of the Paper (not the word “Introduction”), Background or Organizational Context or . . . , (Main Sections of the Paper), and Conclusion.

<sup>4</sup> Section introductions and conclusions are usually not necessary in shorter papers (e.g., 1-2 pages).

<sup>5</sup> All page references refer to Hacker, D. (2008). *A pocket style manual* (5<sup>th</sup> ed.). Boston: Bedford/St. Martin’s.

<sup>6</sup> Other categories for analysis include: assumptions, problems, solutions, and predictions.

<sup>7</sup> There are three strategies for integrating sources into a paper: quotation, paraphrase, and summary.

## Instructor Evaluation for Oral Presentations

<b>Student's Name</b>	<b>Course Number</b>	<b>Assignment</b>
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<b>Specific Requirements</b>	<b>Percentage Distribution Determined by Instructor</b>	<b>Percentage Earned by Student</b>	<b>Instructor Comments</b>
Non-verbal Communication <ul style="list-style-type: none"> <li>▪ Attire (professional)</li> <li>▪ Eye Contact (consistent) and Facial Expressions</li> <li>▪ Posture (straight)</li> <li>▪ Gestures and Movement (appropriate)</li> </ul>	10	<input type="text"/>	▪
Verbal Communication <ul style="list-style-type: none"> <li>▪ Volume and Pitch</li> <li>▪ Pacing and Pauses</li> <li>▪ Clarity and Concision</li> <li>▪ Enthusiasm and Passion</li> </ul>	10	<input type="text"/>	▪
Organization <ul style="list-style-type: none"> <li>▪ Introduction<sup>8</sup> and Conclusion<sup>9</sup></li> <li>▪ Section Titles<sup>10</sup></li> <li>▪ Section Introductions and Conclusions<sup>11</sup></li> <li>▪ Organizing Words, Phrases, and Sentences</li> </ul>	25	<input type="text"/>	▪
Discipline-Specific Knowledge/Content <ul style="list-style-type: none"> <li>▪ Explanation (restate, define, describe, illustrate)</li> <li>▪ Analysis (reasons, causes, effects, purposes)<sup>12</sup></li> <li>▪ Critique (agree, disagree, strengths, weaknesses)</li> <li>▪ Synthesis of Existing Ideas and/or Theories</li> </ul>	25	<input type="text"/>	▪
Discipline-Specific Application <ul style="list-style-type: none"> <li>▪ Contextualization (individual, group, organization, sub-culture, culture, etc.)</li> <li>▪ Recommendations (stop, start, continue, modify)</li> <li>▪ Creation of New Ideas and/or Theories</li> </ul>	10	<input type="text"/>	▪
Christian Worldview (and Other Worldviews) <ul style="list-style-type: none"> <li>▪ Use of Scripture (interpretation and application)</li> <li>▪ View of Scripture</li> <li>▪ View of God, gods, or Ultimate Reality</li> <li>▪ View of Humanity</li> <li>▪ View of Birth, Life, Redemption, &amp; Death</li> <li>▪ View of Creation/Origin, History, the Present, &amp; the End Times</li> <li>▪ View of Knowledge</li> <li>▪ View of Ethics</li> </ul>	10	<input type="text"/>	▪
Misc. <ul style="list-style-type: none"> <li>▪ Research (credibility, number, supporting &amp; opposing viewpoints)</li> <li>▪ Visual Aids<sup>13</sup> (if used)</li> <li>▪ Response to Audience Comments/Questions</li> <li>▪ Time Limit</li> </ul>	10	<input type="text"/>	▪

<b>Total Possible</b>	<b>Total Percentage Earned by Student</b>	<b>Total Possible Points for Assignment</b>	<b>Total Points Earned</b>	<b>Final Grade for Assignment</b>
<b>100%</b>		x	=	

### Explanatory Notes

<sup>1</sup> An effective introduction: (1) grabs attention through a quote(s), statement(s), statistic(s), question(s), and/or story, (2) states the thesis or claim (which needs to be clear, concise, arguable, & controversial(?)), and (3) previews/outlines the paper.

<sup>2</sup> An effective conclusion: (1) summarizes the paper and ties its main points together and (2) ends with final thought(s), question(s), quotation(s), warning(s), challenge(s), and/or action points.

<sup>3</sup> Section titles are often as follows: Title of the Paper (not the word "Introduction"), Background or Organizational Context or..., (Main Sections of the Paper), and Conclusion.

<sup>4</sup> Section introductions and conclusions are usually not necessary in shorter papers (e.g., 1-2 pages).

<sup>5</sup> Other categories for analysis include: assumptions, problems, solutions, and predictions.

<sup>6</sup> Visual aids should only be used if they make a distinct contribution to the presentation; otherwise, they should be avoided. Examples include: PowerPoint, handouts, whiteboards or flipcharts, audio or video, etc.

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