



**The REACH Program of  
Trinity International University**

**BUS 374R:  
Nonprofit Financial Management**

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Student's Manual 1.0

"Any enterprise is built by wise planning, becomes strong through common sense, and profits wonderfully by keeping abreast of the facts"

Proverbs 24:3-4 (TLB)

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## **I. Course Description**

This course explores basic concepts in managing finances of nonprofit organizations. Basic accounting topics explored include budgeting, expense control, and measurement in tax-exempt organizations. In addition, the course investigates fundraising practices, including annual funding capital campaigns, planned giving, special events, and grant proposal approaches and procedures. Ethical implications of fundraising and a survey of laws and regulations are also presented

## **II. Course Overview**

“Financial planning contributes significantly to the success of a nonprofit organization and allows it to better accomplish its mission. Planning tasks are challenging and too often are overlooked. In this time of shrinking governmental support for nonprofit organizations, astute use of available resources following a well-developed financial plan may be the key to a nonprofit’s survival.” – Jody Blazek

Every nonprofit organization depends on the leadership and management skills of its key members. The management tools used by for-profit organizations are readily useful to nonprofits. Business tools and concepts such as budgets, financial forecasts, cash flow statements, strategic planning and environmental assessments are critical to a sustainable and growing nonprofit organization.

Understanding the differences between the legal structure and requirements of for-profit and nonprofit organizations is also vitally important to nonprofit survival. Developing expertise around this area is necessary. However, there is a wealth of resources available to help gain this expertise, and when time does not allow the organization’s leader to acquire training, the nonprofit world offers a corps of consultants to assist.

Each session lays the foundation for understanding the requirements for ensuring that a nonprofit organization is ready to address the management of their financial resources. First, learners discover possible community needs for specific programs and services, and they then consider the required funding for those programs and services. Potential funding sources are subsequently identified. Jody Blazek (CPA) provides the remaining criteria and resources for nonprofit financial management in her book “Nonprofit Planning Made Easy.” Her work is further supplemented by author Ilona Bray’s in-depth look at fundraising.

This course attempts to make the link between fundraising for needful programs, and the essential need for financial management and planning. Leaders will find value in the practical questions asked about financial planning. These questions and activities can serve as the foundation for developing a financial management regime in the nonprofit and for establishing checkpoints for sustainable growth and program success.

### III. Course Materials

#### 1. Required

- a. Download the *Basic Guide to Nonprofit Program Design and Marketing* from the website [http://www.managementhelp.org/prog\\_mng/np\\_progs.htm](http://www.managementhelp.org/prog_mng/np_progs.htm). Place in three-ring binder and bring to each class session.
- b. Blazek, J. (2008). *Nonprofit financial planning made easy*. Hoboken, NJ: John Wiley and Sons.
- c. Bray, I. (2008). *Effective fundraising for nonprofits: Real-world strategies that work* (2<sup>nd</sup> ed.). Berkeley: Nolo.

### 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 (please consult *A Pocket Style Manual* listed above). 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 of Nontraditional Education 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 one day late
- b. 20% off for up to two days 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. Explain and apply the basic concepts on financial planning that help support the dream and mission of the nonprofit organization's founder
2. Explain the process of budget planning and the role of operational data in nonprofit organizations
3. Recognize the various financial tools essential to financial management and explain how leaders can obtain and maintain tax-exempt status
4. Describe the fundamental fundraising tools and the basics of a fundraising plan that is designed to attract individual supporters
5. Determine what is required to keep individuals and major donors engaged in the process of financial giving
6. Explain how leaders can use special events and connections with the business community to generate funds for the nonprofit organization's operations and programs
7. Describe the various forms of communication materials used by nonprofit organizations

## VI. Course Requirements

Course Worksheets (6 x 100 points each)	= 600 points
Participation (6 sessions x 20 points each)	= 120 points
<b>Total Points</b>	<b>720 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...”

1. Implement basic programs and/or services within a nonprofit organization
2. Recognize how a mission statement influences the programs and services offered
3. Explain the concepts and planning methods used by for-profit businesses
4. Understand the role and preferences of nonprofit investors
5. Define the “profit” motto and how it must be managed in nonprofit organizations

#### Assignments Due for Session One

1. Download and read the *Basic Guide to Nonprofit Program Design and Marketing* from the website [http://www.managementhelp.org/prog\\_mng/np\\_progs.htm](http://www.managementhelp.org/prog_mng/np_progs.htm). Place in three-ring binder and bring to each class session.
2. Read *Nonprofit Financial Planning Made Easy*: Preface and Chapter 1
3. Complete Worksheet #1

## Session Two Overview

### Outcomes for Session Two

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

1. Explain the importance of “liquidity” for nonprofit organizations
2. Explain the six financial management activities engaged in by nonprofit leaders
3. Comprehend when outside consultants may be needed by nonprofit leaders
4. Describe the purpose and activities of each stage of the Financial Planning Cycle
5. Research and list all possible sources of revenue for nonprofit organizations
6. Describe the operational realities that are reflected in both balanced and imbalanced budgets
7. Create an initial “Scheduling Budget Process”

### Assignments Due for Session Two

1. Read *Nonprofit Financial Planning Made Easy*: Chapters 2, 3, 4, and 5
2. Complete Worksheet #2

## Session Three Overview

### Outcomes for Session Three

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

1. List the kind of data that feeds into the nonprofit organization that is useful for financial management activities
2. Explain the relationship between the Chart of Accounts, IRS Form 990, and an accounting system
3. Explain the role of performance statistics in nonprofit financial management
4. Describe why it is important for a nonprofit to determine who is an employee
5. Discuss the distinguishing characteristics between a nonprofit organization that is tax-exempt and a nonprofit organization that is not tax-exempt
6. Explain the basic difference between cash method of accounting and the accrual method of accounting

### Assignments Due for Session Three

1. Read *Nonprofit Financial Planning Made Easy*: Chapters: 6, 7, and 8
2. Complete Worksheet #3

## Session Four Overview

### Outcomes for Session Four

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

1. Explain the purpose of a reserve fund
2. Implement a fundraising plan based on the four key tasks noted by Ilona Bray
3. List three major sources of government grants that might supply revenue for students start-up nonprofit
4. Describe how computerized databases are used as a fundraising tool
5. Recognize an organization’s fundraising assets and explain why the identification of those assets is important

### Assignments Due for Session Four

1. Read *Effective Fundraising for Nonprofits: Real-World Strategies that Work*: Chapters 1 through 4
2. Complete Worksheet #4

## Session Five Overview

### Outcomes for Session Five

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

1. Summarize the nature of government grants, who is eligible for government grants, and how to make personal contact with key funders
2. Explain the type of events a nonprofit organization can sponsor so supporters understand the work of the nonprofit
3. Implement in their organization a detailed “Calendar of Activities”
4. Recognize the forms and policies associated with funding from large corporations

### Assignments Due for Session Five

1. Read *Effective Fundraising for Nonprofits: Real-World Strategies that Work*: Chapters 8 and 10
2. Complete Worksheet #5

## Session Six Overview

### Outcomes for Session Six

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

1. Describe the various forms of communication materials used by nonprofit organizations
2. Explain the value of creating annual reports and reviewing annual reports
3. Evaluate nonprofit websites for their ability to communicate their purpose and service their donors/investors and clients or customers
4. Comprehend what kind of articles should be published on a nonprofit’s website
5. Discuss the nature and effectiveness of press releases

### Assignments Due for Session Six

1. Read: *Effective Fundraising for Nonprofits: Real-World Strategies that Work*: Chapters 11, 12, and 13
2. Complete Worksheet #6

## IX. Course Documents

### Session One Documents

#### Worksheet #1

#### Internet Activity

1. After downloading the *Basic Guide to Nonprofit Program Design and Marketing* article from the website [http://www.managementhelp.org/prog\\_mng/np\\_progs.htm](http://www.managementhelp.org/prog_mng/np_progs.htm), read and place in three-ring binder. Bring this article to each class session.
2. List the programs/services offered by three of the following nonprofit organizations
  - a. <http://www.kingdombuilders.com>
  - b. <http://robinsnestic.org>
  - c. <http://www.peacemuseum.org>
  - d. <http://www.accionchicago.org>
  - e. <http://sarahs-circle.org>
  - f. <http://gateway.northpark.edu/about>

After reading *Nonprofit Financial Planning Made Easy*: Preface and Chapter 1, complete the following questions:

#### Preface

1. According to author Jody Blazek, the nonprofit world is clustered into which three distinct groups? Describe what organizational and/or business elements might these three clusters have in common?
2. Research and print out information on three organizations that fit into each of the three aforementioned groups. Bring your findings to class. Be prepared to share (in detail) the mission of each organization and the various services/programs that are provided by each of the organizations.

#### Chapter One

1. Two functions work together to help a nonprofit sustain its existence. What are those two functions? How have you used these two functions in your nonprofit or for-profit organization?
2. What business function or activity translates the mission of the nonprofit organization into financial terms? Explain.
3. What is the relationship between the budgeting activity of a nonprofit organization and its program goals?

4. Why are relevant programs and quality services important to nonprofit investors?
5. How is “profit” defined by nonprofit organizations?
6. Provide a detailed list of the traditional management tools that can help nonprofits achieve organizational objectives for its programs and services.

## Session Two Documents

## Worksheet #2

## Internet Activity

1. Go to <http://www.investopedia.com>, <http://www.americanbanker.com/glossary.html>, and <http://www.unipa.it/~bianchi/eng/paper/naples.pdf> and write out a consolidated definition of the business concept “liquidity.”
2. How is liquidity related to cash? Compare with working definition provided by the instructor.

## Collaborative Exercises:

1. Based on your reading in the textbook, list the possible types of budget reports. Compare your list with two other fellow students. Discuss why the lists may have differed.
2. From page 75, recreate with word processing software the “Scheduling Budget Process.” Make two copies. In the **second** copy, replace the actual steps with a blank line. For example: *Step 1. Set Goals* (in your first copy) would become *Step 1. \_\_\_\_\_* (in your second copy). Using the readings/learnings from the *Basic Guide to Nonprofit Program Design and Marketing* article in your three-ring binder, complete Steps 1 through 4. Compare and discuss your work with at least one other classmate. Make use of the model that follows:

Model of the “Scheduling Budget Process”			
STEP	Description of activity	Complete the Step along with a description of the Step and actual examples based on a real or fictitious organization.	Notes, comments, and/or questions about the Step.
Step 1	Set Goals	{Prepare a list of goals based on the mission statement}	
Step 2	Establish Objectives	{List of measurable objectives/programs that will accomplish stated goals}	
Step 3	Design Programs	{Describe how each program will operate or function; describe how you will know if the program is meeting the stated objectives}	
Step 4	Budget Prepared	{Provide a guesstimate on how much the programs will cost. Describe where the funds will come from to meet the costs.}	

After reading *Nonprofit Financial Planning Made Easy*: Chapters 2 through 5, complete the following questions:

For each of the following study questions, please answer in complete sentences. Place after your sentences the page number where you located your answers.

#### Chapter Two

1. What elements of an organizational structure make financial management more likely to be successful? What other features or practices in an organization are likely to make financial management unsuccessful?
2. Organizational leaders must focus on which six financial management activities? Why are they important?
3. When are outside consultants needed? Why do you think organizational leaders sometimes decide to forgo the use of consultants or ignore the advice of outside professionals? Think of a nonprofit you are a part of and then describe how that organization would specifically benefit from consultants.

#### Chapter Three

1. In Exhibit 3.1 – the Financial Planning Cycle, at what point does the financial management team begin its work to make the nonprofit successful in its dual mission.
2. Briefly describe the purpose and/or activities of each stage in the Financial Planning Cycle.

#### Chapter Four

1. Research and list all the possible sources of revenue for nonprofit organizations. Rank the possible sources of revenue in the order you think is indicative of the largest dollar amounts that could be received from each source. Provide with your list a reference page where you found your information. You may brainstorm with your classmates via phone and/or email.
2. From the reading and personal experience, provide a robust definition of a budget. In class, compare your findings with fellow students and the instructor.

## Chapter 5

1. Explain the goals of a nonprofit financial management team in the context of its organization's solvency, liquid assets, and invested assets.
2. How would a resource flow diagram assist a financial management team with financial planning and asset management (see exhibits 5.1 and 5.2 as references)? What possible consequences might occur if leaders neglect to create and use a resource flow diagram?
3. How does cash flow planning address cash inflow and cash outflow fluctuations?
4. Which two budgets contribute to the cash flow budget?

## Session Three Documents

## Worksheet #3

## Internet Activity

1. Review the software from Intuit that is developed for nonprofit organizations. See <http://quickbooks.intuit.com>. Provide a brief description of software.
2. Find independent reviews on the Peachtree software. Take the tour at <http://www.peachtree.com/peachtreeaccountingline/nonprofits/>

After reading *Nonprofit Financial Planning Made Easy*: Chapters 6, 7, and 8, complete the following questions.

For each of the following study questions, please answer in complete sentences. Place after your sentences the page number where you located your answers.

## Chapter Six

1. Provide a brief list of data that comes from outside the nonprofit organization that is useful in the financial management and the finance planning process.
2. List three general results that are expected to occur after the accurate compilation of financial data. What additional data might be important to capture for the financial success of the nonprofit organization?
3. Describe the relationship between the Chart of Accounts, IRS Form 990, and an accounting system.
4. What should be the chief goal when developing or refining an accounting system?
5. What is the purpose of internal controls in nonprofit financial management?
6. Review and compare the *cash method of accounting* to the *accrual method of accounting*. Be prepared to provide examples in class.

## Chapter Seven

1. What is the role of performance statistics? Explain how your nonprofit could use two or more of these statistics.
2. Why is it important for a nonprofit organization to determine who is an employee? Is it better to have employees on the payroll of a nonprofit

organization, or is it better to retain contractors to work on projects at project pay? Explain your answer.

## Chapter Eight

1. Describe what distinguishes a nonprofit organization that is tax-exempt from a nonprofit organization that is NOT tax-exempt.
2. Under the test for suitability for tax-exemption, why is it important to discuss insider benefits and the distribution of assets when the nonprofit organization ceases all operations?

## Session Four Documents

## Worksheet #4

## Internet Activity:

1. Using the World Wide Web, look up and read about the Volunteer Matching Organizations listed on page 25 of your textbook. Based on the goals of your nonprofit organization (see Worksheet #2), which volunteer organization(s) might you utilize?
2. Review the resources for government funding found at the website at: <http://www.nationalserviceresources.org/node/17622>. List the three sources of grants that are most likely to be a potential source of donated revenue for your nonprofit organization.

## Collaboration Exercise:

1. Contact and work with two or more classmates to brainstorm on specific new fundraising activities for your organization. Create a list, and share it in class.
2. Working with another classmate, write a donor solicitation letter designed to raise support for the Museum of Science and Industry in Chicago. <http://www.msichicago.org>

After reading *Effective Fundraising for Nonprofits: Real-World Strategies that Work*: Chapters 1 through 4, complete the following questions.

For each of the following study questions, please answer in complete sentences. Place after your sentences the page number where you located your answers.

## Chapters 1 and 2

1. Describe the role of the nonprofit organization's board of directors in fundraising activities.
2. Discuss the advantages and disadvantages of volunteers in fundraising work. Why do you think an organization would choose to hire a professional fundraiser?
3. List the primary skills needed to be effective in fundraising and fundraising events. Consider the profiles of the people highlighted in chapter 2. Evaluate your own fundraising abilities in light of this profile.

### Chapter 3

1. Identify the four key tasks that are necessary for the creation of a fundraising plan.
2. What is the value of a reserve fund?
3. To fund the nonprofit's programs, what do fundraising planners look at to determine an approximate total income amount for those programs?
4. What are an organization's fundraising assets? Why is identifying those assets important?

### Chapter 4

1. In what ways can a nonprofit organization develop itself so that it is "support-worthy?"
2. Is there a difference between why an organization's current supports give financially and why potential supports might make donations? Please discuss your findings.
3. Of the many ways a fundraising planner and fundraising director could bring in new supporters, which method is most appealing to you? Why?
4. What is the critical follow-up work that needs to take place after a fundraising campaign is completed and you start to receive replies?

## Session Five Documents

### Worksheet #5

#### Internet Activity:

1. Review the site: Grants.gov (<http://www.grants.gov/index.jsp>). Add a brief commentary about each of the following items/questions listed below.
  - About grants.gov
  - What is a Grant?
  - Who is Eligible for a Grant?
  - Program Highlights
  - What are the best ways to make personal contact with the funders?
2. Review the site: <http://kraft.com/giving> Write a brief commentary on this companies history and policy on working with nonprofit organizations.

After reading *Effective Fundraising for Nonprofits: Real-World Strategies that Work*, Chapters 6, 8, and 10, complete the following questions.

For each of the following study questions, please answer in complete sentences. Place after your sentences the page number where you located your answers.

#### Chapter 6

1. What kind of events could you sponsor to help potential major financial supporters understand what you do as a nonprofit organization?
2. What is a donors' forum? Explain how it could be used in a nonprofit in which you participate.

#### Chapter 8

1. List the reasons for planning and executing a special event.
2. List and briefly describe the types of special events Ilona Bray suggests for nonprofit organizations. What kind of events might be uniquely Christian in their orientation? Is this Christian orientation always necessary?
3. What is involved in choosing the "right event" for your organization?
4. Why is a "calendar of activities" (both internal and external) necessary for special events? How do the tasks of defining committees and assigning committee leaders connect with the calendar of activities?

## Chapter 10

1. What are the two primary sources of grants to nonprofit organizations?
2. Describe the nature of non-foundation corporation giving?

## Session Six Documents

## Worksheet #6

For each of the following study questions, please answer in complete sentences within 2-3 paragraphs. Place after your sentence the page number where you located your answers. Complete all other assigned activities in this worksheet.

After reading *Effective Fundraising for Nonprofits: Real-World Strategies that Work*, Chapters 11 through 13, complete the following questions:

Internet Activity:

Compare the following websites according to their:

- Level of information clutter
- Ease of finding the donations webpage/hyperlink
- Ease of finding the mission and purpose of the nonprofit organization
- The use of multimedia on the web pages
- Information about the organization's management team
- <http://www.feedthechildren.org/> ; <http://www.worldvision.org/> ; <http://www.the-association.org/> ; <http://www.angelfoodministries.com/> ;

After reading *Effective Fundraising for Nonprofits: Real-World Strategies that Work*, Chapters 11 through 13, complete the following questions.

For each of the following study questions, please answer in complete sentences. Place after your sentences the page number where you located in your answers.

## Chapter 11

1. What is the primary use of nonprofit printed communications materials? Locate and bring examples of Christian/church-based print communications that are used for fundraising purposes.
2. Describe the value of annual reports and how they are used in the marketing plan of a nonprofit.

## Chapter 12

1. Visit the websites of five nonprofit universities. Discuss why they qualify as effective websites. Most colleges and universities are nonprofit. However, for-profit higher education organizations are successfully entering the market. Print out material from the university website to share with the class.
2. What kind of articles would a nonprofit organization publish on its website?

## Chapter 13

1. Research and select a nonprofit organization that has a mission statement and one or more programs which you support. What could be a “breaking news” story for this organization? Which type of media would you recommend to carry that news? Why?
2. What are press releases and how are they effective in outreach to a nonprofit’s supporters and/or members?

**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>	Percentage Distribution Determined by Instructor	Percentage Earned by Student	<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.

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<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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