



ORG402

Financial Planning for Nonprofits Syllabus

Course Description

A study of the concepts and principles of financial planning for nonprofits. The students will explore financial planning, including basic planning and leadership principles, underlying organizational issues involved with planning and budgeting, financial planning principles and practices, including in-depth analysis of one organization's planning process, knowledge of how organizational ethics, norms, strategic planning and direction influence both its income and expenses.

Degree Program Outcomes

ORG402 is offered as part of City Vision's Bachelor of Science in Nonprofit Management and Bachelors of Science in Business Administration programs. This course supports two of five program outcomes for the Nonprofit Management program, marked with an asterisk (*). This course supports three of eight program outcomes for the Business Administration program, marked with an asterisk (*).

As a City Vision Nonprofit Management graduate, the student will be professionally competent in these five success areas:

- Understand and apply the roles and responsibilities of a nonprofit board of directors and the management team to provide governance and leadership to the nonprofit organization.
- Understand and apply basic accounting and budgeting principles in order to successfully manage the finances of a nonprofit organization.
- Understand and apply basic marketing, communication and fundraising strategies in operating a successful nonprofit organization.
- Understand and apply nonprofit management principles related to program development, ethics, decision-making and nonprofit legal and regulatory requirements. *
- Understand and apply the essential elements of nonprofit human resource management including volunteer management, hiring, firing, supervision and legal considerations. *

As a City Vision Business Administration graduate, the students will be professionally competent in these eight success areas:

- Communication. Communicate effectively and professionally in business situations through writing and electronic media.
- Awareness. Understand the core functions of a business and demonstrate their application to achieve desired organizational goals.*

- Leadership. Apply traditional theories of management and Christian leadership in business and nonprofit contexts. *
- Finance. Make use of the principles of basic accounting and managerial accounting, through developing, using, and evaluating financial documents in business.
- Economics. Demonstrate an understanding of micro- and macroeconomic principles and practices and evaluate their implications for business strategy.
- Values. Apply principles to develop and grow businesses and nonprofit organizations in a way that is socially responsible and that reflects God's love and purposes for the world.
- Visioning. Create a synthesis of a reflective life vision and plan to enable 24/7 ministry based on God's purposes for work and their own unique calling.
- Specialization. Apply traditional theories and concepts in one area of specialty: nonprofit management, managerial accounting, technology or general management. *

Course Objectives

1. Understand basic planning and leadership principles.
2. Understand the challenges of financial planning.
3. Understand the organizational issues involved with planning and budgeting.
4. Understand the importance of financial planning and practices.
5. Understand how the planning process is influenced by the organization's ethics and norms.

Each course objective listed above is tied to an eight-week period listed below under the "Course Schedule" table.

Required Texts

These are the required resources that every student should obtain.

- Dropkin, M, Halprin, J, La Touche, B. (2007). *The Budget-Building Book for Nonprofits* (2nd edition). San Francisco, CA: Jossey-Bass. (ISBN: 9780787996031.
- Dropkin, M, Hayden, A. (2001). *The Cash Flow Management Book for Nonprofits*. San Francisco, CA: Jossey-Bass. (ISBN: 99780787953850.

Course Schedule

Week	Assessments	Estimated Hours	% of Grade	Course Objective
1	Budget Basics	--	--	--
	Read: Syllabus	.5	--	1
	Read: Chap. 1-6, Budget-Building	3.5	--	1, 3
	Read/Listen: Introduction to Management Accounting and Information in a Changing World:	1	--	1, 2, 3

	Introduction to Planning - PowerPoint in PDF and audio file			
	Week 1: Forum 1: Online video meeting: Introduce yourself, where you work and what your duties are. Be prepared to share your goals for this course and how you hope to use the information for your future endeavors. Fill out student profile and return to instructor	1	1.74%	1
	Week 1: Assignment 1: Complete that study guide for the Budget Building Book's Chapters 1 through 6.	3	3.47%	3
	Week 1: Assignment 2: Schedule an interview with the staff responsible for financial planning in a nonprofit organization	1	3.47%	2
2	Ethics			
	Read: Chap. 7-12, Budget-Building	6	--	1, 5
	Listen/Read: Organizational Aspects of Planning; and Listen/Read Leadership and Ethics	2	--	1, 5
	Week 2: Assignment 1: Leadership and Ethics: Listen, Read and Write a Short Essay assignment on Leadership and Ethics	3	3.47%	3, 5
	Week 2: Assignment 2: Organizational Aspects of Planning: Listen to the audio with the readings then complete and submit the study guide.	3	5.21%	3, 5
	Week 2: Forum 1: Submit a minimum three-paragraph posting entitled "Ethics".	2	1.74%	5
3	Cash Flow Management	--	--	--
	Read: Chaps. 1-5, Cash Flow	4.5	--	1, 3, 4
	Listen/Read: Budgeting Philosophy Case Study Wisdom PowerPoint and Budgeting Case Studies	2	--	3, 4

	Read: Organizational Assessment Assignment	.5	--	3
	Week 3: Forum 1: Write a paragraph on Budgeting Basics and Cash Flow Mgt.	2	1.74%	3, 4
	Week 3: Assignment 1: Budget and Cash Flow fill out and submit the study guide	2.5	4.17%	3
	Week 3: Assignment 2: Organizational Assessment Assignment: Submit a 2-3 page paper describing the organization you plan to study.	4	2.78%	1
4	Budget-Building / Program Development #1	--	--	--
	Review Chaps. 4 – 6, Budget Building. Read the Program Development Project	5	--	2, 4
	Listen/Read: Assessment and Program Development - PowerPoint in PDF; and Assessment and Program Development - Audio for PowerPoint	1	--	2, 4
	Read: Program Description and Assessment Guidelines.pdf; and Needs Assessment Process - Supplement to PowerPoint presentation for Course 405, Lesson 4	1	--	2, 4
	Read: Organization Assessment Assignment.doc; and Program Development Project.doc	1	--	2, 4
	Read: Sample Complete Programs [Lesson 4 through 8]: Day Spot Program Narrative; Day Spot Input and Expenses; Family Reunification Project Program Narrative; Family Reunification Input and Expenses; Mobile Outreach Mission Narrative and Mobile Outreach Mission Input and Expenses	2	--	2, 4
	Week 4: Forum 1: Live Video Session 2: Question/Answer on Expectations for Program Development Project	1	1.74%	2, 4, 5

	Week 4: Assignment 1: Organizational Assessment Interview	4	2.08%	2, 3
	Week 4: Assignment 2: Complete and submit Part 1 of the Program Development Project	5	6.94%	2, 3
5	Program Development #2: Step-by-Step Budget Building	--	--	--
	Read: Chaps. 7 - 10, Budget-Building	4	--	1, 3
	Read/Listen: Budgeting: The Nitty Gritty, How to Overview - PowerPoint for Audio; and Budgeting: The Nitty Gritty, How to Overview - Audio for PowerPoint	1.25	--	1, 2, 3
	Week 5: Forum 1: Program Description: Write a paragraph describing the process you are following to develop your program.	2	1.74%	3, 4
	Week 5: Assignment 1: Resubmit Part 1: Program Description Assignment with any updates for the Program Development Project.	5	5.21%	3, 4
	Week 5: Assignment 2: Complete Program Development Project: Part 2: Program Activities and Inputs Assignment	4	6.94%	3, 4
	Midterm Exam	1	3.47%	1, 3, 4, 5
6	Program Development #3: Expense Budgeting	--	--	--
	View/Read, Chaps. 14 - 15, Budget-Building and Chaps. 6 - 7, Cash Flow. Review/Listen: Describing and Quantifying Needs for Inputs and Activities: Expenses - PowerPoint for Audio	4	--	2, 3, 4
	Week 6: Forum 1: Program expenses. Write a paragraph describing the challenges of the expenses incurred.	2	1.74%	2, 3, 4

	Week 6: Assignment 1: Make suggested changes, edits, and/or additions you have made based on feedback.	4	6.94%	2, 3, 4
	Week 6: Assignment 2: Complete Program Development Project: Part 3: Program Expense	4	4.86%	2, 3, 4
7	Program Development #4: Income – Funding the Dream and Planning for Cash Flows	--	--	--
	Read: Chap. 19, Budget Building and Chap. 8-9; and 20-21, Cash Flow.	2	--	1, 2, 3, 4
	Read/Listen: Funding the Dream - PowerPoint and audio; Planning for Capital Campaigns - PowerPoint and audio; Planning for Cash Flows - PowerPoint and audio	2	--	1, 2, 3, 4
	Week 7: Forum 1: Organizational Assessment. Write a paragraph discussing your assessment of the organization you are partnered with.	2	1.74%	1, 2, 3, 4
	Week 7: Assignment 1: Submit your completed Organizational Assessment Assignment	4	6.94%	2, 3, 4
	Week 7: Assignment 2: Program Development Project: Part 4: Program Income Assignment	4	3.82%	2, 3, 4
	Week 7: Assignment 3: Planning for Cash Flow	1	2.43%	2, 3, 4
8	Program Development Project	--	--	--
	Week 8: Forum 1: Post a paragraph entitled “What I have Learned”.	2	1.74%	1, 2, 3, 4, 5
	Week 8: Assignment 1 Final Project: Complete and submit your entire Program Development Project, incorporating the feedback you have received.	5	6.94%	1, 2, 3, 4, 5
	Final Exam	2	6.94%	1, 2, 3, 4, 5

Course Total	Total estimated hours based upon 14 hours per week for 8 weeks	116.75	100%	--
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† This item is a dedicated faith-integration assessment.

Forums marked with an asterisk (*) indicate they are hybrid and can be completed through a live online meeting.

Estimated Activities and Times

- Reading is measured at 25 textbook pages per hour for normal textbooks and reading 20 pages per hour for dense textbooks. Total reading for this course is 23 hours.
- Listening to live sessions or recorded audio/video elements: 10 hours
- Forum discussions: 43 hours
- Written projects: 36 hours

Guidelines for Written Work

Except for Class Forum posts, all written assignments should be double-spaced using 12-point font and 1-inch margins, and include a relevant heading (name, date, assignment title), and subheadings where appropriate, which can be viewed in a Navigation Pane. Multi-page assignments should also include page numbers. Please correct spelling and grammatical errors before submitting all assignments. Spelling, grammar, and writing style will be taken into consideration in evaluating written work. Every assignment should carry a filename that *must* include your name (Student Name) and the assignment number, e.g. Jan_Smith_Project1.docx

Written work falls into the following 3 categories for standards:

- **Forums.** Follow **Forum Expectations:** <http://www.cityvision.edu/mtm/forum-guidelines>
- **Standard Papers.** Unless indicated that they are for a business or nonprofit audience, all papers should follow APA guidelines for citation as listed here:
[In Text Citation Instructions](#)
[Bibliography Instructions for End of Paper](#)
[Full APA Guidelines](#)
- **Papers for Nonprofit or Business Audiences:** These should follow standard professional writing practices in a business setting. Examples include: business plans, business proposals, grants, nonprofit manuals etc. References for cited materials are required, but may be done informally with hyperlinks as might be done in a business blog. Follow these guidelines:
https://owl.purdue.edu/owl/subject_specific_writing/professional_technical_writing/index.html

Written work must be reflective, balanced, scholarly analysis and be well-supported by references. Students will be assessed on their ability to reflect and to critically examine an issue from many points of view.

Critical Policies to Read for This Course

Note: These policies are critical for all students to read. In case of change, we have linked to the versions on our website to make sure you have the latest version.

- **Grading Scale:** <https://www.cityvision.edu/academic-policies#Grades>

- **Deadlines to Drop Courses:** <https://www.cityvision.edu/academic-policies#Dropping>
- **Attendance, Late Policy and Extensions:** <http://www.cityvision.edu/academic-policies#Policy>
- **Technology Requirements for Courses:**
<https://www.cityvision.edu/technology-requirements-courses>
- **Standards of Academic Integrity & Plagiarism Policy:**
<http://www.cityvision.edu/wiki/standards-academic-integrity>
- **What plagiarism is and how to avoid it**
<https://www.cityvision.edu/what-plagiarism-and-how-do-you-avoid-it>
- **Credit Hour Policy, Grading Policy and Other Academic Policies:**
<https://www.cityvision.edu/academic-policies>
- **ADA Policy, Learning Accommodations & Disabilities Services:**
<https://www.cityvision.edu/ada-policy-learning-accommodations-disabilities-services>
- **Student Code of Conduct:** <https://www.cityvision.edu/university-code-conduct>
- **Library Services:** <https://www.cityvision.edu/library>

Other Important Policies

- **Privacy Policy:** <https://www.cityvision.edu/privacy>
- **Consumer Disclosures:** <https://www.cityvision.edu/disclosures-consumer-information>
- **Catalog.** Additional policies are listed in our catalog at:
<https://www.cityvision.edu/files/catalog.pdf>

*This syllabus is subject to change without notice up until the first day of the semester.
Last updated: September 22, 2019*