Nonprofit Management

Dept. of History   Dr. P. Beisel

HIS-536-040   Office: Dugas L.A. 305

Fall 2014   Office Hours: MWF 8:00-12:00

Ferguson 477   (and by appointment)

W 6:00-8:30   Phone: 468-2093 / Email: pbeisel@sfasu.edu

Course Description

This course will examine the history, function, and establishment of nonprofit organizations with a specific focus on cultural institutions. The course readings, research presentations, and projects will focus on nonprofits' legal documentation, guiding statements, board selection and duties, personnel positions and personalities, manuals and policies, and fiscal responsibilities including fundraising and reporting. Although geared towards students interested in museums, historic sites, and historical associations, this course will be relevant for any graduate student who plans to work for, consult, or assist nonprofit organizations through occupations in social services, government agencies, tourism, and business.

Course Objectives

This course will introduce students to the essential knowledge, skills, and abilities required to successfully conduct the management of nonprofit organization in general and museums, archives, historical societies, and other cultural institutions specifically. Students will read short essays, articles, extended monographs, and technical briefs as they become familiar with the processes, critical issues, and standard terminology and practices of nonprofit management pertaining to leadership and administrators at all levels. The assignments will include individual and group projects, written summaries and reports, and in-class presentations. The "hands-on" emphasis of this course will provide "real world" experiences to complement the traditional reading and lecture phases of a graduate-level course.

Program Learning Outcomes

The SFA History Department has identified the following Program Learning Outcomes (PLOs) for all SFA students earning an M.A. degree in History:

1. The student will be able to explain the key issues and developments in at least two historical periods (one per course).
2. The student will be able to identify the main historical works and interpretive debates associated with an event or period.
3. The student will be able to locate, identify, and critically analyze primary sources.
4. The student will be able to research and analyze effectively an issue or topic in writing.
5. The student will be able to present written work in an appropriate academic style, including the proper citation of sources using Chicago Manual of Style (15th or most recent edition).

This section of this course will focus on PLOs 4, and 5.

Student Learning Outcomes
1. The student will demonstrate in writing an understanding of three broad nonprofit management categories – purpose, organizational structure, personnel responsibilities.
2. The student will demonstrate an ability to complete specific nonprofit management projects on time and evaluate the experience within the theoretical context.
3. The student will demonstrate an ability to function as a member of a team and how to resolve conflicts and differing opinions while producing a quality product.
4. The student will verbally and visually present content information to the class.
5. The student will demonstrate an ability to organize, analyze, and present research in a variety of formats.

Required Books
Brown, William A. *Strategic Management for Nonprofit Organizations*. Burlington, MA: Jones & Bartlett Learning, 2015.
Wolf, Thomas. *Managing a Nonprofit Organization. Updated Twenty-First-Century Edition.* Revised and Updated. New York: Free Press, 2012.

Grading Scale

Assignment (due date)	Points	Weight
In-class participation	15	12%
Three-page Report (9/10)	10	8%
Three-page Report (9/24)	10	8%
Three-page Report (10/29)	10	8%
Three-page Report [lowest of four dropped] (11/12)	10	8%
Funny Money (10/8)	15	12%
Individual Grant (first submission) (10/22)	15	12%
Group Project (others & 12/3 – final submission)	30	24%
Individual Grant (second submission) (12/10)	20	16%
Total	**125**	**100%**

The final grade in the course is determined by the total number of points earned on participation, summaries, presentations, and projects weighted according to the percentages listed above. Students are responsible for reading all instructions, links, study guides, and relevant information posted on D2L. Successful participation includes advance reading, timely submission of assignments, and meaningful contributions to class discussions. As graduate students you are expected to maintain a professional and collegial approach to discussions (verbal and email) both inside and outside of the classroom.

Attendance Policy
Students are expected to attend all classes.

Assignments Note: Unless specifically instructed otherwise, all submitted materials will be double-spaced, 1" margins, left-aligned, 12 point font texts with proper footnote and bibliographic citations per *Chicago Manual of Style*. There is no need for coversheets, however the student's name and date of assignment should be single spaced on the first page. Page numbers, in the same font as the text, should commence at the bottom center of the second page.

Following directions is important when submitting grants, preparing public materials, or "simply" filling out forms. Get in the habit of following directions, precisely, now!!!

Three-page Reports
Write a three-page report of your findings from three nonprofit organizations (never the same three) based on the topic of the selected sets of readings. You need to find each organization's relevant documents, policies, charts, budgets, etc., and develop an collective analysis of the three organizations' materials based on that week's readings. Your report should be a cohesive essay with evidence from all readings rather than a conglomeration of multiple reviews. If you write the fourth report, the lowest grade will be dropped. You may use either properly formatted footnote or parenthetical references (no endnotes). The *due dates* are noted on the class schedule. Each assignment is due in hardcopy at the beginning of the class session.

Funny Money
Each student will utilize Microsoft Excel to produce a series of financial tracking and reporting documents based on the "receipts, paystubs, etc." made available on D2L. The demonstration of basic accounting principles, resource utilization, and the internal spreadsheet formatting will be equally important. All submissions must be printed on 8.5" x 11" paper and submitted at the beginning of class. In addition, each student is to submit an electronic version by class time as well.

Individual Grant Application
Each student will research and write a grant (or series of grants depending upon size) for a minimum of $3,000.00 for one or more local cultural institutions. (See list of organizations and funding requests on D2L). The grant(s) will be submitted twice in order to experience the review and revision process. The *due dates* are noted on the class schedule. Each student will prepare and submit with the final grant(s) a three-page minimum reflective essay. Each assignment is due in hardcopy at the beginning of the class session and is worth a total of thirty-five points. The final grant(s) must be submitted electronically as well.

Group Project
Each team of three or four students will work together to complete a complete organizational package and digitization grant for the creation of a non-profit friends group for the Haskell Cultural Center and Museum, Haskell Indian Nations University, Lawrence, Kansas. (Detailed requirements package will be posted on D2L). The team will submit one printed copy of all materials as well as digital files. The team will write a ten-page minimum report explaining its research, development, rationale, and writing process. Individually, each team member will submit a three-page reflective essay summarizing the group experience and placing the project within the context of nonprofit management. The final *due date* is noted on the class schedule, however there will be intermediary elements and due dates. The assignment is worth a total of thirty points.

Notifications

Non-discrimination
Each student will be free of discrimination or harassment on the basis of sex, race, color, religion, national origin, age, disability, political affiliation, sexual orientation, veteran status, or physical appearance.

Students with Disabilities
To obtain disability related accommodations, alternate formats and/or auxiliary aids, students with disabilities must contact the Office of Disability Services (ODS), Human Services Building, and Room 325, 468-3004 / 468-1004 (TDD) as early as possible in the semester. Once verified, ODS will notify the course instructor and outline the accommodation and/or auxiliary aids to be provided. Failure to request services in a timely manner may delay your accommodations. For additional information, go to http://www.sfasu.edu/disabilityservices/.

Academic Integrity (A-9.1)
Academic integrity is a responsibility of all university faculty and students. Faculty members promote academic integrity in multiple ways including instruction on the components of academic honesty, as well as abiding by university policy on penalties for cheating and plagiarism.

Definition of Academic Dishonesty
Academic dishonesty includes both cheating and plagiarism. Cheating includes but is not limited to (1) using or attempting to use unauthorized materials to aid in achieving a better grade on a component of a class; (2) the falsification or invention of any information, including citations, on an assigned exercise; and/or (3) helping or attempting to help another in an act of cheating or plagiarism. Plagiarism is presenting the words or ideas of another person as if they were your own. Examples of plagiarism are (1) submitting an assignment as if it were one's own work when, in fact, it is at least partly the work of another; (2) submitting a work that has been purchased or otherwise obtained from an Internet source or another source; and (3) incorporating the words or ideas of an author into one's paper without giving the author due credit.

Please read the complete policy at http://www.sfasu.edu/policies/academic_integrity.asp

Withheld Grades *(Semester Grades Policy, A-54)*
Ordinarily, at the discretion of the instructor of record and with the approval of the academic chair/director, a grade of WH will be assigned only if the student cannot complete the course work because of unavoidable circumstances. Students must complete the work within one calendar year from the end of the semester in which they receive a WH, or the grade automatically becomes an F. If students register for the same course in future terms the WH will automatically become an F and will be counted as a repeated course for the purpose of computing the grade point average.

Collections Management – Fall 2014 – Preliminary Calendar	
Date	ACTIVITIES, READINGS, AND ASSIGNMENTS (& OUTSIDE EVENTS)
8/27	Introduction to Course & Tour of the East Texas Research Center – no readings
9/3	What is a Nonprofit Organization? • Brown, *Strategic Management*, Chapter 1 • Wolf, *Managing a Nonprofit*, Chapter 1 • Schultz, "Becoming a Public Historian," Patterson, "In Local Historical Agencies, Museums, and Societies," Franco, "In Urban History Museums and Historical Societies," Bryan, "In State Historical Agencies, Museums, and Societies: A Constant State of Change," in Gardner and LaPaglia, *Public History: Essays from the Field*. • Alexander, "The Rise of American History Museums," in Tolles, ed., *Leadership for the Future*.
9/10	The Board (Three Page Report #1 Due)
9/17	Organizational Documents
9/24	Guiding Statements (Three Page Report #2 Due)
10/1	Grants
10/8	Financial Statements & Fiscal Procedures
10/15	Financial Management (Funny Money Due)
10/22	The Workforce (Individual Grant due – First Submission)
10/29	Personnel Policies (Three Page Report #3 Due)
11/5	Marketing & Fund Raising
11/12	Sustainability (Three Page Report #4 Due – Optional)
11/19	Time to Change?
11/26	**Thanksgiving Break**
12/3	Leadership – Are you Ready? Group Project due & Reflective Essays submitted individually
12/10	Final Exam Week – no readings Individual Grant due – Final Submission & Reflective Essay

HIS536 Fall 2014
Nonprofit Management – Week 2
What is a Nonprofit Organization?

Readings
- Brown, *Strategic Management*, Chapter 1 (required text)
- Wolf, *Managing a Nonprofit*, Chapter 1 (required text)
- Alexander, "The Rise of American History Museums," in Tolles, ed., *Leadership for the Future*. (pdf on D2L)
- Schultz, "Becoming a Public Historian," Patterson, "In Local Historical Agencies, Museums, and Societies," Franco, "In Urban History Museums and Historical Societies," Bryan, "In State Historical Agencies, Museums, and Societies: A Constant State of Change," in Gardner and LaPaglia, *Public History: Essays from the Field*. (on reserve)

Resources

- Charity Navigator - http://www.charitynavigator.org/
- Drucker, Peter. "Managing the Nonprofit Organization." In *The Drucker Lectures*: *Essential Lessons on Management, Society, and Economy*, edited by Rick Wartzman. New York: McGraw Hill, 2009. (pp. 221-227) [HD31 .D769 2010X] {typical fast-paced snapshot of success}
- Frumkin, Peter. On Being Nonprofit: A Conceptual and Policy Primer. Cambridge: Harvard University Press, 2002. [HD2769.15 .F78 2002] {chapters 1 & 6 of particular use for introduction}
- GuideStar – http://www.guidestar.org/Home.aspx
- Internal Revenue Service - http://www.irs.gov/Charities-&-Non-Profits/Exempt-Organizations-Select-Check (Employer Identification Number - EIN; Auto-Revocation List; 990-N, e-Postcard)
- National Center for Charitable Statistics - http://nccs.urban.org/ (and National Taxonomy of Exempt Entities - http://nccs.urban.org/classification/NTEE.cfm)
- National Council of Nonprofits - http://www.councilofnonprofits.org/
- Powell, Walter W. and Richard Steinberg, eds. *The Non-Profit Sector. A Research Handbook*. New Haven, CT: Yale University Press, 2006.

Discussion Questions
- What are the common myths about nonprofit organizations?
- What is the purpose of a nonprofit organization?
- What is the advantage of a nonprofit organization?
- What qualifies an organization as a 501(c)(3)?
- Who determines if an organization is a nonprofit?

HIS536 Fall 2014
Nonprofit Management – Week 3
The Board

Readings
- Brown, *Strategic Management*, Chapter 7 (required text)
- Wolf, *Managing a Nonprofit*, Chapter 2 (required text)
- Independent Sector, "Principles for Good Governance and Ethical Practice: A Guide for Charities and Foundations," October 2007.
- Anderson, Gail ed. *Reinventing the Museum: The Evolving Conversation on the Paradigm Shift*. 2nd edition. Lanham, MD: AltaMira Press, 2012. Chapter 25 "The Visitors' Bill of Rights" and Chapter 39 "The Source." (on D2L)
- Genoways, Hugh H. and Lynne M. Ireland. *Museum Administration: An Introduction*. Walnut Creek, CA: AltaMira Press, 2003. Chapter 3, "The Working Museum," 39-55. (on reserve)
- Kammen, Carol. "On Board." *AASLH History News* 68, No. 2 (Spring 2013): 3-4. (via Steen Library)

Resources

- BoardSource - https://www.boardsource.org/eweb/
- Independent Sector – http://www.independentsector.org/
- CompassPoint - http://www.compasspoint.org/home (especially Board Café)
- Howe, Fisher. *Welcome to the Board. Your Guide to Effective Participation*. San Francisco: Jossey-Bass Publishers, 1995.
- Jaskyte, Kristina. "Boards of Directors and Innovation in Nonprofit Organizations." *Nonprofit Management & Leadership* 22, No. 4 (Summer 2012): 439-459.
- Malaro, Marie C. *Museum Governance: Mission, Ethics, Policy*. Washington: Smithsonian Institution Press, 1994. {Part I and Chapters 8 & 9 focused on boards, as usual very precise and well written}

Discussion Questions
- How do board members decisions further the organization?
- Who makes an ideal board member? How is that criteria determined?
- How might board members inhibit the performance of the organization?
- What is the relationship between the executive director and the board?
- What is the legal responsibility/limit of board members?
- How does the board chairperson influence the decision making?
- What is the correct number of board members?
- How/When does the board articulate and pursue the mission?
- How do board members resolve differences of opinion?

HIS536 Fall 2014
Nonprofit Management – Week 4
Organizational Documents

Readings
- Brown, *Strategic Management*, Chapter 1 (required text)
- Wolf, *Managing a Nonprofit*, Chapter 1 (required text)
- Genoways, Hugh H. and Lynne M. Ireland. *Museum Administration: An Introduction*. Walnut Creek, CA: AltaMira Press, 2003. Chapter 2, "In the Beginning." (on reserve)
- Internal Revenue Service, "Life Cycle of a Public Charity," March 22, 2013. http://www.irs.gov/Charities-&-Non-Profits/Charitable-Organizations/Life-Cycle-of-a-Public-Charity (online)
- Internal Revenue Service, "Publication 557: Tax-Exempt Status for Your Organization" Revised October 2013. http://www.irs.gov/pub/irs-pdf/p557.pdf (Chapters 1-3, and pages 68-74). (online)
- Texas C-BAR, "Forming a Nonprofit Tax-Exempt Corporation in Texas," 2010 edition.

Resources
- Lord, Barry, Gail Dexter Lord, and Lindsay Martin. *Manual of Museum Planning: Sustainable Space, Facilities, and Operations*. 3rd edition. Lanham, MD: AltaMira Press, 2012. Pages 47-53.
- Malaro, Marie C. and Ildiko Pogany DeAngelis. *A Legal Primer on Managing Museum Collections*. Washington, DC: Smithsonian Books, 2012.
- National Center for Charitable Statistics at the Urban Institute, "Form 990 Online," efile.form990.org.
- Nezhina, Tamara G. and Jeffrey L. Brudney. "Unintended? The Effects of Adoption of the Sarbanes-Oxley Act on Nonprofit Organizations." *Nonprofit Management & Leadership* 22, No. 3 (Spring 2012): 321-346.
- Texas Secretary of State, "Nonprofit Organizations," http://www.sos.state.tx.us/corp/nonprofit_org.shtml
- Texas Comptroller of Public Accounts, "Texas Taxes: Exemptions for Qualified Organizations," http://www.cpa.state.tx.us/taxinfo/exempt/index.html

Discussion Questions
- What is the purpose of bylaws? How can they protect or hinder an organization?
- What are the articles of incorporation and where should they be filed?
- What are the benefits of becoming incorporated?
- What is the annual tax form which must be filed by a nonprofit organization?
- What would be the benefit of a museum operating as a for-profit institution? Why does the International Council of Museums (ICOM) not include for-profit in its definition of museums?

Readings
- Brown, *Strategic Management*, Chapters 2, 3, & 5 (required text)
- Wolf, *Managing a Nonprofit*, Chapter 1 (required text)
- Lord, Gail Dexter and Kate Markert. *The Manual of Strategic Planning for Museums*. Lanham, MD: AltaMira Press, 2007. pp. 2-15 (on D2L)
- Teeple, Bruce, "Straight Talk about Historic Structures and Landscapes," in Cinnamon Catlin-Legutko and Stacy Klingler, eds., *The Small Museum Toolkit, Book 2. Financial Resource Development and Management*. Lanham, MD: AltaMira Press, 2013. pp. 57-80. (on D2L)

Resources
- Graham, John W. and Wendy C. Havlick. *Mission Statements: A Guide to the Corporate and Nonprofit Sectors*. New York: Garland, 1994.
- Mind Tools Corporate. http://www.mindtools.com/.
- Oster, Sharon M. *Strategic Management for Nonprofit Organizations: Theory and Cases*. New York: Oxford University Press, 1995. (Chapter 2)

Discussion Questions
- Which statements would you identify as mandatory? Why?
- Which statements would you identify as optional? Why?
- How often, if at all, should these statements be reviewed and updated?
- What are the advantages and disadvantages of frequent statement revisions?

HIS536 Fall 2014
Nonprofit Management – Week 6
Grants

Readings
- Brophy, Sarah. "Is Your Site Grant-Ready? How to Prepare to Attract Grants." Technical Leaflet #257. *AASLH History News* 67, No. 1 (Winter 2012). (Steen)
- Hruska, Benjamin, "'Oh, Just Write a Grant and Fix the Building': Landing Grants to Support Your Institution," in Cinnamon Catlin-Legutko and Stacy Klingler, eds., *The Small Museum Toolkit, Book 2. Financial Resource Development and Management*. Lanham, MD: AltaMira Press, 2013. pp. 57-80. (on D2L)
- Ward, Deborah. *Writing Grant Proposals that Win*. 4th edition. Burlington, MA: Jones & Bartlett Learning, 2012. Chapters 1-8, and Proposals 1-5 in Chapter 9. (on reserve)

Resources
- Grants.gov (www.grants.gov) – federal grants listings for all agencies
- COS Pivot (pivot.cos.com) – fee based database for research and academic funding
- Grant Space (grantspace.org) and Foundation Directory Online (fdo.foundationcenter.org) – fee based services of the Foundation Center a nonprofit to support philanthropy
- Communities Foundation of Texas (www.cftexas.org) – connects individual donors to organizations; has regional offices
- Texas Historical Commission (http://www.thc.state.tx.us/) – state historic preservation office of Texas
- Humanities Texas (http://www.humanitiestexas.org/) – nonprofit support of humanities
- Texas Commission on the Arts (http://www.arts.texas.gov/) – state arts agency

Discussion Questions
- What would you characterize as the three most important characteristics of a successful grant?
- How does one determine the best funding source for a project?
- How much information does an organization need to provide? How much is too much?
- Describe the basic steps of the grant writing process.
- Which documents are commonly requested by funders and thus would be critical to have immediately available for the writing process?
- How do you balance grantor's goals/mission and grantee's needs?

HIS536 Fall 2014
Nonprofit Management – Week 7
Financial Statements & Fiscal Procedures

Readings

- Wolf, *Managing a Nonprofit*, Chapter 7 (required text)
- Genoways, Hugh H. and Lynne M. Ireland. *Museum Administration: An Introduction*. Walnut Creek, CA: AltaMira Press, 2003. Chapter 5, "Budgets and Accounting." (on reserve)
- Larkin, Richard F. and Marie DiTommaso. *Wiley Not-For-Profit GAAP 2014: Interpretation and Application of Generally Accepted Accounting Principles*. 11th edition. Hoboken, NJ: John Wiley & Sons, Inc., 2014. Chapters 2-4, 7-10, 15, 19, and 21. (ebook Steen) Note: focus on terms and rationale for best practices, don't sweat the FASB ASC!
- Oster, Sharon M. *Strategic Management for Nonprofit Organizations: Theory and Cases*. New York: Oxford University Press, 1995. Chapter 9, "Managerial Control" and Case H, "The Solomon R. Guggenheim Foundation." (on reserve)

Resources

- Any "Principles of Accounting I" textbook
- Calabrese, Thad. "Running on Empty: The Operating Reserves of U.S. Nonprofit Organizations." *Nonprofit Management & Leadership* 23, No. 3 (Spring 2013): 281-302.

Discussion Questions

Readings

- Brown, *Strategic Management*, Chapter 10 (required text)
- Wolf, *Managing a Nonprofit*, Chapter 6 (required text)
- Bergman, Rachel Orlins. "Hope for the Best, Plan for the Worst." *AASLH History News* 57, No. 2 (Spring 2002): 13-15. (D2L)
- Bez, Marianne and Amy Cunningham. "Membership Matters: Establishing a Vital Membership Program in Your Museum." Technical Leaflet #237. *AASLH History News* 62, No. 1 (Winter 2007). (D2L)
- Graffagnino, J. Kevin. "Philanthropy for History Organizations: The Inner Circle." *AASLH History News* 57, No. 2 (Spring 2002): 17-20. (D2L)

Resources

- Karl Besel, Charlotte Lewellen Williams, Joanna Klak. "Nonprofit Sustainability During Times of Uncertainty." *Nonprofit Management & Leadership* 22, No. 1 (Fall 2011): 53-65.
- Nielsen, Richard P. "Piggybacking Strategies for Nonprofits: A Shared Costs Approach." *Strategic Management Journal* 7 (1986): 201-215.

Discussion Questions

HIS536 Fall 2014
Nonprofit Management – Week 9
The Workforce

Readings
- Brown, *Strategic Management*, Chapter 4 (required text)
- Wolf, *Managing a Nonprofit*, Chapter 3 (required text)
- Allison, David B. et al. "Building Staff Investment through Teams: Conner Prairie Museum's Shift to a Team Structure." *AASLH History News* 68, No. 3 (Summer 2013): 16-19. (Steen)
- Bomar, William F. "Skills Most Valued for Entry-Level Professional Museum Positions." Technical Leaflet #261. *AASLH History News* 68, No. 1 (Winter 2013): 16-19. (Steen)
- Devine, "Administrators: Students of History and Practitioners of the Art of Management," in Gardner and LaPaglia, *Public History: Essays from the Field*. (on reserve)
- Genoways, Hugh H. and Lynne M. Ireland. *Museum Administration: An Introduction*. Walnut Creek, CA: AltaMira Press, 2003. Chapter 9, "The Working Museum," 55-71. (on reserve)
- Haldeman, Astra. "From (A)rts to (Z)ombies: A Young Friends Group How-To." Technical Leaflet #265. *AASLH History News* 69, No. 1 (Winter 2014). (Steen)
- Kane, Katherine. "It's All About the Leadership." *AASLH History News* 69, No. 1 (Winter 2014): 23-26. (Steen)

Resources
- Fopp, Michael A. *Managing Museums and Galleries*. New York: Routledge, 1997. {Chapters 4-6 relevant for this week; excellent glossary}
- Grasse, Nathan, Trenton Davis, Douglas Ihrke. "Compensation of Nonprofit Executive Directors: Examining the Influence of Performance and Organizational Characteristics." *Nonprofit Management & Leadership* 24, No. 3 (Spring 2014): 377-398.
- Thomas Jr., R. Roosevelt. *Beyond Race and Gender. Unleashing the Power of Your Total Work Force by Managing Diversity*. New York: AMACOM, 1991.
- Wang, Lili and Robert F. Ashcraft. "Needs Assessment and Curriculum Mapping: Enhancing Management Skills of the Nonprofit Workforce." *Nonprofit Management & Leadership* 23, No. 1 (Fall 2012): 121-136.

Discussion Questions

Readings

- Wolf, *Managing a Nonprofit*, Chapter 4 (required text)
- Catlin-Legutko, Cinnamon and Stacy Klingler, eds. *The Small Museum Toolkit, Book 3. Organizational Management*. Lanham, MD: AltaMira Press, 2013. Appendix B & C, 130-132. (on D2L)
- Genoways, Hugh H. and Lynne M. Ireland. *Museum Administration: An Introduction*. Walnut Creek, CA: AltaMira Press, 2003. Chapter 7, "Personnel Management." (on reserve)

Resources

Discussion Questions

HIS536 Fall 2014
Nonprofit Management – Week 11
Marketing & Fund Raising

Readings

- Wolf, *Managing a Nonprofit*, Chapters 5 & 8 (required text)
- Genoways, Hugh H. and Lynne M. Ireland. *Museum Administration: An Introduction*. Walnut Creek, CA: AltaMira Press, 2003. Chapter 6, "Development" and Chapter 11 "Marketing and Public Relations." (on reserve)
- Panas, Jerold. *Asking: A 59-Minute Guide to Everything Board Members, Volunteers, and Staff Must Know to Secure the Gift*. XX: Emerson & Church, 2007.
- International Council of Museums. *Marketing the Arts: Every Vital Aspect of Museum Management*. Lanham, MD: UNIPUB, 1994.

Resources

Discussion Questions

Readings

- Brown, *Strategic Management*, Chapters 6, 8, 9 (required text)
- Wolf, *Managing a Nonprofit*, Chapters 9 & 10 (pages 325-349) (required text)
- Bryson, John M. *Strategic Planning for Public and Nonprofit Organizations*. 4th edition. XX: Jossey-Bass Publishers, 2011.
- Catlin-Legutko, Cinnamon. "DIY Strategic Planning for Small Museums." Technical Leaflet #242. *AASLH History News* 63, No. 2 (Spring 2008). (D2L)
- Cook, Cherie and Nina Zannieri. "Helping History Organizations Achieve National standards One StEP at a Time." *AASLH History News* 65, No. 4 (Autumn 2010): 12-16. (Steen)
- Genoways, Hugh H. and Lynne M. Ireland. *Museum Administration: An Introduction*. Walnut Creek, CA: AltaMira Press, 2003. Chapter 4, "Strategic Planning." (on reserve)

Resources

- AASLH, StEPS Program, established 2009, http://tools.aaslh.org/steps/
- Courtney, Roger. *Strategic Management for Voluntary Nonprofit Organizations*. Routledge Studies in the Management of Voluntary and Non-Profit Organizations, Stephen P. Osborne, editor. New York: Routledge, 2002.
- Lord, Gail Dexter and Kate Markert. *The Manual of Strategic Planning for Museums*. Lanham, MD: AltaMira Press, 2007.
- McHatton, Patricia Alvarez, Wendy Bradshaw, Peggy A. Gallagher, and Rebecca Reeves. "Planning Process: Benefits for a Nonprofit Organization." *Nonprofit Management & Leadership* 22, No. 2 (Winter 2011): 233-249.

Discussion Questions

HIS536 Fall 2014
Nonprofit Management – Week 13
Time to Change?

<u>Readings</u>
- Brown, *Strategic Management*, Chapter 11 (required text)
- Wolf, *Managing a Nonprofit*, Chapter 11 (required text)
- Guthrie, Kevin. "The New-York Historical Society: Lessons from One Nonprofit's Long Struggle for Survival." Houston: Connexions, Rice University, 2009. {now OpenStax CNX – www.cnx.org}
- Lord, Gail Dexter and Kate Markert. *The Manual of Strategic Planning for Museums*. Lanham, MD: AltaMira Press, 2007. Case studies 1.1 & 8.1 (on reserve)
- Matelic, Candace T. "Understanding Change and Transformation in History Organizations." Technical Leaflet #242. *AASLH History News* 63, No. 2 (Spring 2008). (D2L)

<u>Resources</u>

<u>Discussion Questions</u>

Readings

- Brown, *Strategic Management*, Chapter 12 (required text)
- Wolf, *Managing a Nonprofit*, Chapter 10 (pages 349-357) (required text)
- Costello, Thomas M. and Patricia E. Williams. "Managing Through Hard Times." Technical Leaflet #250. *AASLH History News* 65, No. 2 (Spring 2010). (Steen)
- Dearstyne, Bruce. "The Nature of Leadership: Strategies for Leading Historical Programs." Technical Leaflet #258. *AASLH History News* 67, No. 2 (Spring 2012). (Steen)
- Drucker, Peter F. *Management Challenges for the 21st Century*. New York: HarperBusiness, 1999. Chapter 6, "Managing Oneself." (D2L)
- Durel, John W. and Anita N. Durel. "The Leader's Intent." *AASLH History News* 69, No. 1 (Winter 2014). (Steen)
- Graffagnino, J. Kevin. "Do You Really Want to be a CEO?" *AASLH History News* 58, No. 4 (Autumn 2003): 12-14. (D2L)
- Hoskins, Steven. "Calculating Risk: A Guide to Project Management for History Professionals." Technical Leaflet #260. *AASLH History News* 67, No. 4 (Autumn 2012). (Steen)
- Stark, Douglas. "Mid-Career Professionals and Museum Leadership." *AASLH History News* 63, No. 2 (Spring 2008): 13-16. (D2L)
- Weiss, Allison. "Relevance, Relationships, and Resources: The Three R's of Museum Management." *AASLH History News* 67, No. 2 (Spring 2012). (Steen)

Resources

- Ackerson, Anne W. and Joan H. Baldwin. *Leadership Matters*. Lanham, MD: AltaMira Press, 2014.
- Allen, Stephanie Lutz, Joseph E. Smith, Nancy Da Silva. "Leadership Style in Relation to Organizational Change and Organizational Creativity. Perceptions from Nonprofit Organizational Members." *Nonprofit Management & Leadership* 24, No. 1 (Fall 2013): 23-42.
- Drucker, Peter F. *Managing the Non-Profit Organization: Practices and Principles*. New York: HarperCollins Publishers, 1990.
- Fopp, Michael A. *Managing Museums and Galleries*. New York: Routledge, 1997. {Chapters 1-3, 6-7 relevant for this week; excellent glossary}
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Leadership – Are you Ready?

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Discussion Questions

- What are the most important skills and characteristics of a successful leader?
- As a board member, what types of executive director might be the best in a situation when there is a crisis with staffing and programming, with identity and mission, with funding and sustainablility?
- Which skills could you bring to an organization right now?
- Which skills do you see that you need to develop the most over the course of the next few years?
- Does the type and/or mission of a non-profit influence the effectiveness of directors?
- Do you want to be a director? Why? Could you do it even if you'd prefer not to?
- What are some of the reasons directors may fail or be a wrong fit for an institution?