

AAD - 626 - Financial Management for Fundraising

New Course Form

New Course

Turn on help text

* denotes required fields

1. General Information

a. Submitted by the College of: * <input type="text" value="College of Fine Arts (8X000)"/>	
b. Department/Division: * <input type="text" value="Arts Administration (CM8X000AAD)"/>	
c. Contact Person Name: Rachel Shane	
Email: * <input type="text" value="rachel.shane@uky.edu"/>	Phone: * <input type="text" value="859-257-7717"/>
d. Requested Effective Date: * <input type="radio"/> Semester following approval <input checked="" type="radio"/> Specific Term/Year	If Specific Term/Year: <input type="text" value="Fall 2019"/>

Courses are typically made effective for the semester following approval. No course will be made effective until all approvals are received.

Is this course clinical? Also select "Yes" if the course is not clinical but you wish for the course to be reviewed by the HCCC* <input type="radio"/> Yes <input checked="" type="radio"/> No
What is the rationale for this proposal?* This course will be the first course in the new proposed Graduate Certificate in Fundraising & Development. It provides the baseline knowledge for understanding the financial considerations in the rest of the certificate coursework.

2. Designation and Description of Proposed Course.

a. Will this course also be offered through Distance Learning?*

Yes No

You must also submit the Distance Learning Form in order for the proposed course to be considered for DL delivery.

b. Prefix:*

AAD

Number:* 626

c. Full Title:* Financial Management for Fundraising

d. Transcript Title
(if full title is more than 40 characters):

e. To be Cross-listed with (Prefix and Number):

Using the Files tab in the Proposal Toolbox, attach a letter of support from the chair of the cross-listing department.

f. Courses must be described by at least one of the meeting patterns below. Include number of actual contact hours for each meeting pattern type.

In general, undergraduate courses are developed on the principle that one semester hour of credit represents one hour of classroom meeting per week for a semester, exclusive of any laboratory meeting. Laboratory meeting, generally, re: two hours per week for a semester for one credit hour. (from SR 5.2.1)

For courses with variable credit, please use the following format (no spaces): ###

Lecture: 3

Laboratory:

Clinical:

Colloquium:

Seminar:

Studio:

Recitation:

Residency:

Discussion:

Indep.Study:

Practicum:

Research:

Other:

- g. Identify a grading system:***
- Letter (A, B, C, etc.)
 - Pass/Fail
 - Medicine Numeric Grade
 - Graduate Level Grade Scale

h. Number of credits:* 3

i. Is this course repeatable for additional credit?* Yes No

If YES: Maximum number of credit hours:

If YES: Will this course allow multiple registrations during the same semester? Yes No

j. Course Description for Bulletin:* Financial management is a central function of successful nonprofit fundraising. In the nonprofit sector, the concept of contributed income is a key framework that must be understood by fundraisers and will be emphasized in this course. In addition, professional fundraisers are the source of financial information to both internal and external stakeholders, and successful financial analysis is essential for sound strategic planning and governance. This course guides students through key topics of financial management including accounting practices, contributed and earned revenue, time value of money, interpreting financial statements, creating mission-driven budgets, analyzing cash-flow, and managing investments.

k. Prerequisites, if any:

3. Will this course be taught off campus?

a.* Yes No

If YES, enter the off campus address:

4. Frequency of Course Offering.

a. Course will be offered (check all that apply):* Fall Spring Summer Winter

b. Will the course be offered every year?* Yes No

If No, explain:

5. Facilities and Personnel

a. Are facilities and personnel necessary for the proposed new course available?* Yes No

If No, explain:

6. Enrollment

a. What enrollment (per section per semester) may reasonably be expected?* 20

7. Anticipated Student Demand.

a. Will this course serve students primarily within the degree program?* Yes No

b. Will it be of interest to a significant number of students outside the degree pgm?* Yes No

If YES, explain:

8. Check the category most applicable to this course:

Check one:* Traditional – Offered in Corresponding Departments at Universities
 Elsewhere

- Relatively New – Now Being Widely Established
 Not Yet Found in Many (or Any) Other Universities

9. Course Relationship to Program(s).

a. Is this course part of a proposed new program? Yes No

If YES, name the proposed new program: Graduate Certificate in Fundraising & Development

b. Will this course be a new requirement for ANY program? Yes No

If YES, list affected programs:

In order to change a program, a program change form must also be submitted.

10. Information to be Placed on Syllabus.

a. Is the course at the 400G- or 500-level? Yes No

If YES, the *differentiation for undergraduate and graduate students must be included* in the information required in 10.b. You must include: (i) identification of additional assignments by the graduate students; and/or (ii) establishment of different grading criteria in the course for graduate students. (See SR 3.1.4)

Confirm b. *The syllabus, including course description, student learning outcomes, and grading policies (and 400G-/500-level grading differentiation if appl 10.a above) are attached.

Distance Learning Form

This form must accompany every submission of a new/change course form that requests a change in deliver mode. All fields are required!

Introduction/Definition: For the purposes of the Commission on Colleges Southern Association of Colleges and Schools accreditation review, *distance learning* is defined as a formal educational

process in which the majority of the instruction (interaction between students and instructors and among students) in a course occurs when students and instructors are not in the same place. Instruction may be synchronous or asynchronous. A distance learning (DL) course may employ correspondence study, or audio, video, or computer technologies.

A number of specific requirements are listed for DL courses. **The department proposing the change in delivery method is responsible for ensuring that the requirements below are satisfied at the individual course level.** It is the responsibility of the instructor to have read and understood the university-level assurances regarding an equivalent experience for students utilizing DL (available at <http://www.uky.edu/USC/New/forms.htm>).

Instructor Name: Nancy Denholm

Instructor Email: ndde226@uky.edu

Check the method below that best reflects how the majority of the course content will be delivered.

Internet/Web-based

Interactive Video

Hybrid

Curriculum and Instruction

1. How does this course provide for timely and appropriate interaction between students and faculty and among students? Does the course syllabus conform to University Senate Syllabus Guidelines, specifically the Distance Learning Considerations?

The instructor and students will participate in weekly discussions. Additionally, students will be submitting assignments for grading for each of the fifteen units. After submitting the assignments, students will receive feedback with their graded assignment from the instructor within seven days. The rather quick grading turn around allows students to determine how well they are progressing. The syllabus does conform to the guidelines.

2. How do you ensure that the experience for DL student is comparable to that of a classroom-based student's experience? Aspects to explore: textbooks, course goals, assessment of student learning outcomes, etc.

The course offers content for students which is in the form of video and Prezi presentations. Plus, we offer an accessible Google Doc as an alternative. The course also contains discussion forums, where students can discuss course content through a guiding prompt. Plus, the course will contain a Q & A discussion forum, where students can ask questions about the course. The graded assignments and discussions measure the learning outcomes within the course. The readings will provide students with a foundation from which they can expand by participating in the assignments and discussions.

3. How is the integrity of student work ensured? Please speak to aspects such as password-protected course portals, proctors for exams at

This online course will be offered through the university's learning management system, which is Canvas at the moment. Students will be required to sign-in to Canvas, which is a password protected portal. The course does not include exams. Instead, the course includes assignments that ask students to complete real-world projects. Due to the nature of the assignments, each submission should be unique to each student. Additionally, the syllabus lists the Academic Integrity policy.

interactive video sites; academic offense policy; etc.

4. Are you adding distance learning delivery to this course as part of an effort to offer a complete degree program 100% online? Yes No

If yes, which program(s)? A new graduate certificate: Fundraising & Development

5. How are students taking the course via DL assured of equivalent access to student services, similar to that of a student taking the class in a traditional classroom setting? Within our online courses, we provide ways for students to access the various resources at the university (i.e., library, ITS Services, Canvas support, instructional designer). Plus, we deliver an orientation for students in order for them to get acquainted with the expectations as well as the resources available to them to help meet those expectations.

Library and Learning Resources

6. How do course requirements ensure that students make appropriate use of learning resources? Within the course, assignment instructions provide specific requirements for students.

7. Please explain specifically how access is provided to laboratories, facilities, and equipment appropriate to the course or program. We deliver an online student orientation for each new cohort of graduate students. Within the orientation, students learn about the equipment required for the program and learn how to access it before attending their first course.

Student Services

8. How are students informed of procedures for resolving technical complaint? Does the syllabus list the entities available to offer technical help with the delivery and/or receipt of the course, such as the Canvas Support The syllabus does contain information for resolving complaints, Canvas, ITS Service Desk, and a department-specific instructional designer.

**Hotline/Chat or
ITS Service Desk?**

Canvas Support Hotline/Chat (<https://uk.instructure.com/>; Click Help Button for 24/7 service)

Information Technology Services (ITS) Service Desk (<http://www.uky.edu/UKIT/Help/>)

9. Will the course be delivered via services available through ITS Academic Technologies & Faculty Engagement? Yes No

If no, explain how students enrolled in DL courses are able to use the technology employed, as well as how students will be provided with assistance in using said technology. The course is delivered by the university's learning management system.

10. Does the syllabus contain all the required components, below? Yes

Instructor's *virtual* office hours, if any.

The technological requirements for the course.

Contact information for Information Technology Customer Service Center:

Web: <http://www.uky.edu/UKIT/>

Phone: 859-218-HELP

Web Address for Distance Learning Programs: <http://www.uky.edu/ukonline/>

Procedure for resolving technical complaints.

Preferred method for reaching instructor, e.g. email, phone, text message.

Maximum timeframe for responding to student communications.

Language pertaining academic accommodations:

"If you have a documented disability that requires academic accommodations, please see me as soon as possible during scheduled office hours. In order to receive accommodations in this course, you must provide me with a Letter of Accommodation from the Disability Resource Center (DRC). The DRC coordinates campus disability services available to students with disabilities. It is located on the corner of Rose Street and Huguelet Drive in the Multidisciplinary Science Building, Suite 407. You can reach them via phone at (859) 257-2754 and via email at drc@uky.edu. Their web address is <http://www.uky.edu/StudentAffairs/DisabilityResourceCenter/>.

Information on Distance Learning Library Services

Carla Cantagallo, DL Librarian

Web: <http://libraries.uky.edu/DLLS>

Phone: 859 218-1240

Email: carla@uky.edu

DL Interlibrary Loan Service: <http://libraries.uky.edu/ILL>

11. I, the instructor of record, have read and understood all of the university-level statements regarding DL.

Instructor Name: Nancy Denholm

Administration Use Only

OBJID

AAD 626: Financial Management for Fundraising



Instructor Information

Instructor: Nancy Denholm

Email: ndde226@uky.edu*

Telephone: 859-257-9616

Virtual Office Hours: Mondays 4pm to 5pm EST US

Response Time: Professor will respond to student emails within 48 hours.

* Preferred method for Reaching instructor.

UK's Information Technology Customer Service Center

Website: <http://www.uky.edu/ukat/help>

Telephone: 859-218-HELP

Email: 218help@uky.edu

Course Description

Financial management is a central function of successful nonprofit fundraising. In the nonprofit sector, the concept of contributed income is a key framework that must be understood by fundraisers and will be emphasized in this course. In addition, professional fundraisers are the source of financial information to both internal and external stakeholders, and successful financial analysis is essential for sound strategic planning and governance. This course guides students through key topics of financial management including accounting practices, contributed and earned revenue, time value of money, interpreting financial statements, creating mission-driven budgets, analyzing cash-flow, and managing investments.

Course Learning Outcomes (CLO)

Upon completing this course students will be able to:

- Identify the basic terms, concepts, and rules related to financial accounting, financial management, earned and contributed revenue, and contributions
- Evaluate financial management issues in case studies and suggest solutions
- Identify the concept of time value of money and apply related formulas to given scenarios to make decisions
- Analyze the financial condition of a real nonprofit organization by interpreting the 990 tax form, examining financial statements, and calculating financial ratios and indicators
- Create a mission-based operational budget for a nonprofit organization utilizing sound budgeting techniques
- Identify key characteristics of short-term and long-term investment funds and vehicles
- Research and discuss current nonprofit financial management issues
- Devise a cash-flow forecast for a nonprofit organization by ensuring the necessary cash is available for a given time of operation

Required Texts

- Weikard, Lynne A., Greg G. Chen, and Ed Sermier. [*Budgeting & Financial Management for Nonprofit Organizations: Using Money to Drive Mission Success*](#). Thousand Oaks, CA: CQ Press, 2013. ISBN: 978-1608716937

Course Schedule

Unit 1: Who Cares: Why Financial Management Matters

Unit Outcomes:

- [CLO¹] Research and discuss current nonprofit financial management issues
 - Sign-up as a guest editor for this course’s “The Nonprofit Financial Times” after reading the setup and determining how you will need to participate throughout the course
 - Analyze examples of real nonprofit organizations’ financial failures and suggest ways to avoid them
- [CLO] Identify the basic terms, concepts, and rules related to financial accounting, financial management, and contributions
 - Identify issues and challenges of financial management in nonprofit organizations

Readings:

- Weikard, Lynne A., Greg G. Chen, and Ed Sermier. “Chapter 1: An introduction to Nonprofits: Mission and Money.” In *Budgeting & Financial Management for Nonprofit Organizations: Using Money to Drive Mission Success*. Thousand Oaks, CA: CQ Press, 2013.

Tasks/Assignments Due:

- Group Google Doc: The Worst Way
- Unit 1 Discussion: Why Financial Management Matters
- Setting Up for the Nonprofit Financial Times
- Guest Editor Sign-Up Document

Unit 2: Getting It: Financial Terms and Tools

Unit Outcomes:

- [CLO] Identify the basic terms, concepts, and rules related to financial accounting, financial management, and contributions
 - Identify the basic terms and concepts of financial accounting and financial management

¹ Course Learning Outcome

- [CLO] Analyze the financial condition of a real nonprofit organization by interpreting the 990 tax form, examining financial statements, and calculating financial ratios and indicators
 - Identify the different types and characteristics of financial statements
 - Complete an organizational profile of the nonprofit organization that you will study for the duration of the course

Readings:

- Weikard, Lynne A., Greg G. Chen, and Ed Sermier. “Chapter 5: Basic Principles of Accounting and Reporting Requirements.” In *Budgeting & Financial Management for Nonprofit Organizations: Using Money to Drive Mission Success*. Thousand Oaks, CA: CQ Press, 2013.
- Weikard, Lynne A., Greg G. Chen, and Ed Sermier. “Chapter 6: Understanding Financial Statements.” In *Budgeting & Financial Management for Nonprofit Organizations: Using Money to Drive Mission Success*. Thousand Oaks, CA: CQ Press, 2013.

Tasks/Assignments Due:

- Unit 2 Quiz: Basic Terms and Concepts
- Project, Part 1: Organizational Profile

Unit 3: In Charge: Financial Leadership and Key Players

Unit Outcomes:

- [CLO] Research and discuss current nonprofit financial management issues
 - Research and discuss current financial management issues in the nonprofit field
- [CLO] Identify and categorize the key financial leaders, their roles, and skills for an organization
 - Identify the basic terms, concepts, and rules related to financial accounting, financial management, and contributions

Readings:

- Blazek, Jody. “Chapter 2: Structuring the Organization for Fiscal Strength.” In *Nonprofit Financial Planning Made Easy*. Hoboken, NJ: John Wiley & Sons, 2008.

Tasks/Assignments Due:

- Article Submission: The Nonprofit Financial Times, Edition #1
- Unit 3 Discussion: The Nonprofit Financial Times, Edition #1
- *Guest Editor Reflections for Unit 3 Discussion: NFT, Edition #1 (*only Guest Editors)

- Project, Part 2: Financial Leadership

Unit 4: Sharing Our Finances: The Nonprofit IRS Forms

Unit Outcomes:

- [CLO] Research and discuss current nonprofit financial management issues
 - Research and discuss current nonprofit financial management issues
- [CLO] Analyze the financial condition of a real nonprofit organization by interpreting the 990 tax form, examining financial statements, and calculating financial ratios and indicators
 - Interpret the data from Parts I-VII of the Form 990
 - Utilize GuideStar to locate financial data for 501(c)3 organizations

Readings:

- Swords, Peter. "[Chapter 1: Basic Facts about the Filer.](#)" In *How to Read the New IRS Form 990*. 2011.
- Swords, Peter. "[Chapter 2: What Kind of Programs the Filer Run and How Much Does It Spend on Them.](#)" In *How to Read the New IRS Form 990*. 2011.
- Swords, Peter. "[Chapter 3: Who are the Filer's Board Members and How Does the Filer Govern Itself? Did the Filer Change in Any Significant Way During the Year?](#)" In *How to Read the New IRS Form 990*. 2011.
- Arden Theatre Company, [Form 990, FY2016](#)
- GuideStar. "[Highlights of IRS Form 990.](#)" 2016.

Tasks/Assignments Due:

- Article Submission: The Nonprofit Financial Times, Edition #2
- Unit 4 Discussion: The Nonprofit Financial Times, Edition #2
- *Guest Editor Reflections for Unit 4 Discussion: NFT, Edition #2 (*only Guest Editors)
- Project, Part 3: Trend Analysis, Part A

Unit 5: The Gritty Details: The 990 Line by Line, Part I

Unit Outcomes:

- [CLO] Analyze the financial condition of a real nonprofit organization by interpreting the 990 tax form, examining financial statements, and calculating financial ratios and indicators
 - Interpret the data from Parts VIII-XII of the Form 990
 - Utilize GuideStar to locate financial data for 501(c)3 organizations

Readings:

- GuideStar. [Form 990 Tutorial](#) - Full. 2011.

- Swords, Peter. “[Chapter 4: How Much Income Did the Filer Receive and from What Sources.](#)” In *How to Read the New IRS Form 990*. 2011.
- Swords, Peter. “[Chapter 5: What Did the Filer Spend its Money On?](#)” In *How to Read the New IRS Form 990*. 2011.

Tasks/Assignments Due:

- Project, Part 4: Trend Analysis, Part B

Unit 6: Thank you! Thank you! Contributions and Acknowledgements

Unit Outcomes:

- [CLO] Identify the basic terms, concepts, and rules related to financial accounting, financial management, and contributions
 - Identify various concepts related to contributions and acknowledgement requirements
- [CLO] Analyze the financial condition of a real nonprofit organization by interpreting the 990 tax form, examining financial statements, and calculating financial ratios and indicators
 - Compare financial trend analysis results with group members and complete a Master Worksheet for chosen organization

Readings:

- IRS. [Charitable Contributions: Substantiation and Disclosure Requirements](#). 2016.
- Watch the Video: [The Art of the Steal](#)

Tasks/Assignments Due:

- Unit 6 Quiz: Contributions
- Project, Part 5: Trend Analysis, Part C

Unit 7: The Time Value of Money

Unit Outcomes:

- [CLO] Identify the concept of time value of money and apply related formulas to given scenarios to make financial decisions
 - Identify the concept of time value of money
 - Apply future and present value formulas to given scenarios to make financial decisions
- [CLO] Evaluate financial management issues in case studies and suggest solutions based on a real nonprofit organization

- Analyze a case study by identifying issues and suggesting solutions based on a real nonprofit organization

Readings:

- Weikard, Lynne A., Greg G. Chen, and Ed Sermier. “Chapter 11: Time Value of Money and Cost-Benefit Analysis (**read only from pp. 227-234**).” In *Budgeting & Financial Management for Nonprofit Organizations: Using Money to Drive Mission Success*. Thousand Oaks, CA: CQ Press, 2013.
- Dobrin, Peter. [Orchestra plays, but what role?](#). *Philadelphia Inquirer*, October 18, 2015.
- Kenneth C. Loudon and Jane P. Loudon. “How to Analyze a Case Study” in *Essentials of Management Informations Systems*. Pearson. 2005. [URL: http://wps.prenhall.com/bp_laudon_essmis_6/21/5555/1422312.cw/content/index.html].

Tasks/Assignments Due:

- Unit 7 Quiz: The Time Value of Money
- Unit 7 Case Study Analysis

Unit 8: We Did It! Statement of Activities

Unit Outcomes:

- [CLO] Research and discuss current nonprofit financial management issues
 - Research and discuss current nonprofit financial management issues
- [CLO] Analyze the financial condition of a real nonprofit organization by interpreting the 990 tax form, examining financial statements, and calculating financial ratios and indicators
 - Utilize statement of activities in order to calculate a nonprofit’s bottom line, money mix, expense allocations, and fundraising efficiency
 - Analyze a nonprofit’s financial indicators in combination with benchmark data

Readings:

- Weikard, Lynne A., Greg G. Chen, and Ed Sermier. “Chapter 7: Financial Analysis.” In *Budgeting & Financial Management for Nonprofit Organizations: Using Money to Drive Mission Success*. Thousand Oaks, CA: CQ Press, 2013.

Tasks/Assignments Due:

- Article Submission: The Nonprofit Financial Times, Edition #3
- Unit 8 Discussion: The Nonprofit Financial Times, Edition #3

- *Guest Editor Reflections for Unit 8 Discussion: NFT, Edition #3 (*only Guest Editors)
- Project, Part 6: Financial Condition Assessment (Getting Started)

Unit 9: Here We Are Now: Statement of Position

Unit Outcomes:

- [CLO] Analyze the financial condition of a real nonprofit organization by interpreting the 990 tax form, examining financial statements, and calculating financial ratios and indicators
 - Utilize statement of financial position in order to calculate liquidity and solvency ratios
 - Analyze the short-term and long-term financial health of a nonprofit organization utilizing key indicators
 - Identify red flags for financial distress from financial statements

Readings:

- GuideStar Newsletter. [Why Ratios Aren't the Last Word](#). June 2004.
- Kramer, Peter. [Top Indicators of Nonprofit Financial Health](#). Guidestar Blog. April 2013.

Tasks/Assignments Due:

- Project, Part 6: Financial Condition Assessment

Unit 10: Where Do We Want to Go: Budgeting

Unit Outcomes:

- [CLO] Research and discuss current nonprofit financial management issues
 - Research and discuss current nonprofit financial management issues
- [CLO] Create a mission-based operational budget for a nonprofit organization utilizing sound budgeting techniques
 - Compose a set of goals for the creation of an operating budget by effectively collaborating with group members

Readings:

- Weikard, Lynne A., Greg G. Chen, and Ed Sermier. "Chapter 2: Budgeting as Part of the Planning Process." In *Budgeting & Financial Management for Nonprofit Organizations: Using Money to Drive Mission Success*. Thousand Oaks, CA: CQ Press, 2013.

Tasks/Assignments Due:

- Article Submission: The Nonprofit Financial Times, Edition #4
- Unit 10 Discussion: The Nonprofit Financial Times, Edition #4
- *Guest Editor Reflections for Unit 10 Discussion: NFT, Edition #4 (*only Guest Editors)
- Project, Part 7: Setting Goals

Unit 11: The Cold Hard Cash: Budgeting for Revenues**Unit Outcomes:**

- [CLO] Create a mission-based operational budget for a nonprofit organization utilizing sound budgeting techniques
 - Format an operational budget template for a nonprofit organization
 - Identify budget categories and line items
 - Project unearned, earned and other revenue for a nonprofit organization

Readings:

- Virginia Society of Certified Public Accountants. [Budgeting: A Guide for Small Nonprofit Organizations](#). Glen Allen, VA: Virginia Society of Certified Public Accountants, September 2011.

Tasks/Assignments Due:

- Project, Part 8: Projecting Revenues

Unit 12: It's Gonna Cost: Budgeting for Expenses**Unit Outcomes:**

- [CLO] Create a mission-based operational budget for a nonprofit organization utilizing sound budgeting techniques
 - Project salaries, wages, and benefits
 - Utilize reasonability calculations to project expenses for a nonprofit organization

Readings:

- Coe, Charles K. ["Mandatory and Optional Fringe Benefits."](#) in Nonprofit Financial Management, 108-112. Wiley & Sons, Inc. 2011.

- Watkins Uiberall. [Tennessee Nonprofit Compensation Study 2016](#). Tupelo, MS: Watkins Uiberall.

Tasks/Assignments Due:

- Project, Part 9: Projecting Expenses

Unit 13: Putting it Together: The Operational Budget

Unit Outcomes:

- [CLO] Create a mission-based operational budget for a nonprofit organization utilizing sound budgeting techniques
 - Create a surplus, deficit, or break-even operational budget for a nonprofit organization
 - Construct an argument which aligns organizational goals to financial planning

Readings:

- Healy, Patrick. "[Nonprofit Theater Companies Enjoying, Well, Profits](#)." New York Times, December 16, 2011.
- MacMillan, Kyle. "[Colorado Symphony Adds Concerts After Finances Forced Cuts](#)." Denver Post, November 16, 2011.
- Maddox, David. [Strategic Budget Cutting](#). The Grantsmanship Center. 1999.
- Royce, Graydon. "[Minn. Orchestra Deficit: \\$2.9 Million](#)." Star Tribune, December 7, 2011.
- Cunniffe, Eileen and Julie Hawkins. [Staging a Comeback: How the Nonprofit Arts Sector Has Evolved since the Great Recession](#). Nonprofit Quarterly. February 9, 2016.

Tasks/Assignments Due:

- Project, Part 10: Operational Budget

Unit 14: Cash Flow Management

Unit Outcomes:

- [CLO] Research and discuss current nonprofit financial management issues
 - Research and discuss current nonprofit financial management issues
- [CLO] Devise a cash flow forecast for a nonprofit organization by ensuring the necessary cash is available for a given time of operation

- Devise a cash flow forecast for a nonprofit organization
- Justify cash flow decisions based on sound financial practices

Readings:

- Weikard, Lynne A., Greg G. Chen, and Ed Sermier. “Chapter 3: Liquidity and Managing Cash Flow.” In *Budgeting & Financial Management for Nonprofit Organizations: Using Money to Drive Mission Success*. Thousand Oaks, CA: CQ Press, 2013.
- Spilker, Tim. [How to Make a Cash Flow Projection](#). Los Angeles, CA: The Grantsmanship Center, 2004.
- Propel Nonprofits. [Managing Cash Flow](#). Minneapolis, MN: Propel Nonprofits, n.d..

Tasks/Assignments Due:

- Article Submission: The Nonprofit Financial Times, Edition #5
- Unit 14 Discussion: The Nonprofit Financial Times, Edition #5
- *Guest Editor Reflections for Unit 14 Discussion: NFT, Edition #5 (*only Guest Editors)
- Unit 14 Assignment: Cash Flow Forecast

Unit 15: Protecting Our Future: Investment Management

Unit Outcomes:

- [CLO] Identify key characteristics of short-term and long-term investment funds and vehicles
 - Identify short-term and long-term investment policies, vehicles, and the associated benefits and risks
- [CLO] Analyze the financial condition of a real nonprofit organization by interpreting the 990 tax form, examining financial statements, and calculating financial ratios and indicators
 - Prepare and present final recommendations to the nonprofit organization you have been studying for the duration of the semester

Readings:

- Weikard, Lynne A., Greg G. Chen, and Ed Sermier. “Chapter 13: Investment Strategies.” In *Budgeting & Financial Management for Nonprofit Organizations: Using Money to Drive Mission Success*. Thousand Oaks, CA: CQ Press, 2013.
- Mintz, Joshua and Chelsey Ziegler. [Mission Related Investing: Legal and Policy Issues to Consider Before Investing](#). Chicago, IL: MacArthur Foundation. March 2013.

- Technologyguru. “[How to Edit Videos Using the YouTube Video Editor.](#)” YouTube video, 12:46. Posted [October 2015].
- Currier, Alyce. “[You Can Look Snazzy on a Webcam.](#)” *Wista* (blog). October 10, 2012.
- Wista. “[The Down and Dirty Lighting Kit.](#)” *Wista* (blog). n.d.

Tasks/Assignments Due:

- Unit 15 Quiz: Investment
- Project, Part 11: Financial Presentation

Grading Information

Each student’s overall course grade will be computed according to the following breakdown:

Assignment	Weight
Discussions and Article Submissions	18%
Guest Editor	4%
Quizzes and Assignments	18%
Project	60%
1: Organizational Profile (3%)	
2: Financial Leadership (3%)	
3: Trend Analysis, Part A (3%)	
4: Trend Analysis, Part B (3%)	
5: Trend Analysis, Part C (6%)	
6: Financial Condition Assessment (10%)	
7: Setting Goals (4%)	
8: Projecting Revenues (4%)	
9: Projecting Expenses (4%)	
10: Operational Budget (10%)	
11: Financial Presentation (10%)	
TOTAL	100%

Course Policies and Procedures

The Course Policies and Procedures described below apply to all courses in the MA in Arts Administration program.

G.uky.edu Account

All students enrolled in Arts Administration must have a g.uky.edu account in order to utilize Google Apps for Education. Students **may not** use a personal gmail account. If you do not currently have a g.uky.edu account, please set one up by following the directions in the following video:

WATCH: [UKY Email Settings and Chrome User Accounts](#)

If you have previously set-up a g.uky.edu account but have forgotten your password, please contact the [UKY Customer Services](#). If you have completed all of these steps and are still having difficulty, please contact [Joe French](#), Instructional Designer or stop by his office in Fine Arts, room 207A.

Google Apps

The Department of Arts Administration utilizes Google Apps for Education extensively in its courses. In order to use Google Apps, you will need to have set up your g.uky.edu account. This is required for all students enrolled in a AAD course.

If you aren't already a Google Drive user, it will be helpful to watch this tutorial on using the Drive.

WATCH: [Google Drive Tutorial 2018 - Quick Start](#)

WATCH: [Google Docs and Sheets 2017](#)

Google Drive has many functionalities that we think you will really like including being able to share and collaborate on documents in real time, adding comments and seeing the revision history of documents. Here are videos that discuss additional features and how to use them.

WATCH: [Sharing your Documents and Files](#)

WATCH: [Working on the Same File at the Same Time](#)

WATCH: [Comments in Google Docs](#)

WATCH: [Revision History - Google Drive Tutorial](#)

WATCH: [View and Edit Your Files Offline](#)

Submissions

All assignments should be submitted via Canvas following the instructions provided on the unit's assignment sheet. All assignments must be submitted by **11:59 pm EST/EDT US** in order for it to be considered on time.

Assignments should be labeled for digital submission as follows:

lastname_firstinitial_unitnumber_assignment.ext

For example, Jane Smith's assignment for a Unit 1 assignment called 'essay' would be:

Smith J u1 Essay.doc

Unless otherwise stated, text-based documents should be submitted as a Word document using the .doc or .docx extension. Follow the specific formatting instructions in the assignment sheet for other types of submissions.

Late Submissions

Assignments that are submitted anytime after **11:59 pm EST/EDT US** due date are considered late.

There is a 10-point deduction for each day an assignment is late. Assignments that are seven or more days late will receive a grade of "0".

Number of Days Late	Late Penalty	Highest Grade Possible
1	-10	90%
2	-20	80%
3	-30	70%
4	-40	60%
5	-50	50%
6	-60	40%
7 or more days late	0	0%

Grading Explanation

Letter Grade: A

Range: 90 to 100 percent

Characterization: Excellent

Explanation:

Student demonstrates a full understanding of the subject matter, exemplary critical and creative thinking, strong comprehension of concepts presented in literature and previous work in the subject area, and highly developed communication and presentation skills. The work is of outstanding quality according to the criteria established for graduate level evaluation

Letter Grade: B

Range: 80 to 89 percent

Characterization: Good

Explanation:

Student demonstrates above average comprehension of the subject matter, above average critical and creative thinking, familiarity with concepts presented in literature and previous work in the subject area, and above average communication and presentation skills. The work is of passing quality according to graduate level evaluation criteria.

Letter Grade: C

Range: 70 to 79 percent

Characterization: Average

Explanation:

Student demonstrates average comprehension of the subject matter, average critical and creative thinking, familiarity with basic concepts found in literature and previous work in the subject area, and average communication and presentation skills. The work is of passing quality according to graduate level evaluation criteria.

Letter Grade: E

Range: 0 to 69 percent

Characterization: Failing

Explanation:

The student shows inadequate understanding of subject matter, fails to complete course requirements, shows no demonstration of critical or creative thinking, and has very poor communication skills. The work is clearly of unacceptable quality according to the evaluation criteria.

Academic Integrity

Per university policy, students shall not plagiarize, cheat, or falsify or misuse academic records. Students are expected to adhere to University policy on cheating and plagiarism in all courses. The minimum penalty for a first offense is a zero on the assignment on which the offense occurred. If the offense is considered severe or the student has other academic offenses on their record, more serious penalties, up to suspension from University may be imposed.

Plagiarism and cheating are serious breaches of academic conduct. Each student is advised to become familiar with the various forms of academic dishonesty as explained in the Code of Student Rights and Responsibilities. Complete information can be found at the following website:

<http://www.uky.edu/Ombud>

A plea of ignorance is not acceptable as a defense against the charge of academic dishonesty. It is important that you review this information as all ideas borrowed from others needs to be properly credited.

Senate Rules 6.3.1 (see <http://www.uky.edu/Faculty/Senate/> for the current set of Senate Rules) states that all academic work, written or otherwise, submitted by students to their instructors or other academic supervisors, is expected to be the result of their own thought, research, or self-expression. In cases where students feel unsure about a question of plagiarism involving their work, they are obliged to consult their instructors on the matter before submission.

When students submit work purporting to be their own, but which in any way borrows ideas, organization, wording, or content from another source without appropriate acknowledgment of the fact, the students are guilty of plagiarism.

Plagiarism includes reproducing someone else's work (including, but not limited to a published article, a book, a website, computer code, or a paper from a friend) without clear attribution. Plagiarism also includes the practice of employing or allowing another person to alter or revise the work, which a student submits as his/her own, whoever that other person may be. Students may discuss assignments among themselves or with an instructor or tutor, but when the actual work is done, it must be done by the student, and the student alone.

When a student's assignment involves research in outside sources or information, the student must carefully acknowledge exactly what, where and how he/she has employed them. If the words of someone else are used, the student must put quotation marks around the passage in question and add an appropriate indication of its origin. Making simple changes while leaving the organization, content, and phraseology intact is plagiaristic. However, nothing in these Rules shall apply to those ideas, which are so generally and freely circulated as to be a part of the public domain.

Please note: Any assignment you turn in may be submitted to an electronic database to check for plagiarism.

Decorum and Civility

Free discussion, inquiry and expression are encouraged in this class. Classroom behavior that interferes with either (a) the instructor's ability to conduct the class or (b) the ability of students to benefit from the instruction is not acceptable. Criticism should be constructive, well-meaning and well-articulated. Please, no tantrums, rants or profanity.

Accommodations

If you have a documented disability that requires academic accommodations, please see me as soon as possible during scheduled office hours. In order to receive accommodations in this course, you must provide me with a Letter of Accommodation from the Disability Resource Center (DRC). The DRC

coordinates campus disability services available to students with disabilities. It is located on the corner of Rose Street and Huguelet Drive in the Multidisciplinary Science Building, Suite 407. You can reach them via phone at (859) 257-2754 and via email at drc@uky.edu. Their web address is <http://www.uky.edu/DisabilityResourceCenter>.

Technical Requirements

Hardware

Minimum suggested computer hardware:

- Processor: dual Core 1.3 Ghz or higher
- RAM: 4 GB or more preferred (minimum 2 GB)
- Hard Drive: 250 GB or larger preferred (minimum 100 GB or larger)
- Wireless card: 802.11n preferred (minimum 802.11 b/g compatible)
- Operating system: Most recent version for your hardware (for example, Mac OS 10.8 or Windows 7)
- Keyboard
- Mouse (or equivalent)
- Webcam (some laptops come with an integrated webcam and will not require an external device)

External Devices:

- Printer (doesn't matter if it is color or black/white)
- Scanner for documents and images
- Headphones or headset with microphone
- Digital Camera
- Other helpful options: DVD/CD drive/burner, external hard drive (for data backup/extra storage), and laptop security cable

Minimum suggested laptop computer hardware:

- Microphone (sometimes is integrated with the webcam or with a headset)

Optional:

- Mobile Device (iPhone, iPad, Android)
<http://www.uky.edu/ukat/hardwareguide>

Software

Software (required)

- Up to date virus software

- PDF reader, Adobe Acrobat Reader
- Microsoft Office (Excel, Word, PowerPoint)
- (available free through <https://download.uky.edu/>)
- Google Drive installed on computer
- Latest version of Firefox Internet Browsing software (mozilla.org)
- Adobe Flash Installed

Provided by the University of Kentucky

- Adobe CC (will be available when class begins)
- Microsoft Office Suite (Word, Excel, PowerPoint)

Web browser

Internet Browser (required)

- The latest version of Firefox (Cookies must be enabled; Pop-Blocker must be disabled)

Internet Browser (optional)

- The latest version of Google Chrome (Cookies must be enabled; Pop-Blocker must be disabled)

Internet

Internet Connection (required)

- DSL, cable, or any high-speed internet connection

Resources

Downloadable Applications (required)

- Java
- JavaScript
- Flash

Download University Software

- <https://download.uky.edu/>

Additional Resources

Technical Requirements:

- <https://www.uky.edu/elearning/technology/technicalrequirements>

Procedure for Resolving Technical Complaints

Students should contact the University of Kentucky Help Desk with technical complaints.

Email: 218help@uky.edu

Information to include:

- Course Name and Number
- Unit Number
- Assignment number
- Description of the problem

**Make sure to copy the course Instructor and Joe French, Instructional Designer, on the email.*

Contact Information

Program contacts

Arts Administration Program
artsadministration@uky.edu
859.257.9616

Department Chair
Rachel Shane, Ph.D.
rachel.shane@uky.edu
859.257.7717

Director of Graduate Studies
Geraldine Maschio, Ph.D.
gmasc1@email.uky.edu
859.257.8201

Instructional Designer
Joe French
joe.french@uky.edu
859.218.1347

IT Support

Information Technology Customer Service Center

UKAT (<http://www.uky.edu/ukat/help>) provides technical support to University of Kentucky students. If students are having difficulty with UK-related systems, call 859-218-4357.

Other Technical Complaints: If students are having difficulty with their own computer or software, they will be responsible for resolving these as soon as possible.

Distance Learning Library Services

The goal of Distance Learning Library Services is to provide access to information resources for the students who take classes through the Distance Learning Programs. Services include:

- Access to the University's circulating collections
- Document Delivery & Interlibrary Loan
- Research Assistance
- Information on Distance Learning Library Services:
<http://www.uky.edu/Libraries/DLLS>

DL Librarian

Carla Cantagallo

Local phone number: 859 218-1240

Email: dlservice@email.uky.edu

DL Interlibrary Loan Service:

http://libraries.uky.edu/page.php?lweb_id=253

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