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| **COURSE SCHEMA# for Financial Management (IST2087-1OL) – Winter Quarter 2015 – David Carlson, Ph.D., Instructor** | | |
| ***Tracks*** | **Financial Management (FM) Analysis (68 points)** | **Fund-Raising/Stewardship (FRS) Connections (32 points)** |
| ***Guiding***  ***Questions*** | *What are the components and organizational dynamics of effective financial management for congregations and other NPOs? What key documents, concepts, principles, and issues are involved? What are the connections between financial management and the mission and vision of the congregation/NPO? What are the role(s) and responsibilities of the pastor or NPO leader in all of this?* | *What are the central, or underlying, meanings of the terms “fund-raising” and “stewardship”? In what way(s), if any, are these concepts deeply connected? Does their interconnection—if any—differ significantly between congregations and so-called ”secular” nonprofit organizations? In what ways do these concepts relate to the mission and vision of the congregation/NPO? What are the role(s) and responsibilities of the pastor or NPO leader in all of this?* |
| ***Required***  ***Readings*** | T. Wolf: Ch. 1 (“Understanding Nonprofit Organizations”); Ch. 6 (“Financial Management”); and Ch. 7 (“Financial Statements and Fiscal Procedures”) in *Managing a Nonprofit Organization* [required text]  CPAs of Canada**:** *A Guide to Financial Statements of NPOs: Questions for Directors to Ask* [on Canvas]  Connors & Callaghan: Ch. 14 (“Staffing the Financial Function”) in *Financial Management for Nonprofit Organizations* [on Canvas] *(2 pts for Ch. 1 posting)* | J. C. Alexander: *It’s Not Your Parents’ Offering Plate* [required text]  C. Lane: *Ask, Thank, Tell* [required text]  D. J. Hall: Introduction and final chapter (“On Being Stewards”) in *The Steward: A Biblical Symbol Come of Age* [on Canvas]  T. Wolf: Ch. 8 (“Fund-Raising”) [from required text]  H. J. M. Nouwen: “Fundraising As Ministry” in *A Spirituality of Fundraising* [on Canvas]  Three **FRS Reading Groups** of 6-7 students each. Three initial postings and at least three response postings are required. *(14 pts)* |
| ***Course***  ***Project*** | Each student will develop a comprehensive **FM Project Profile** of a specific congregation/NPO through a study of its financial documents and procedures, plus interviews with the pastor or NPO leader and others. *(16 pts for completing the Profile outline. Additional* ***FM Project******Profile*** *points are included in* ***FM Final Paper*** *below.)* | *What are the elements and dynamics of fund-raising and stewardship in the “Project Profile Congregation/NPO” selected by the student—and in the other three congregations/NPOs selected by the Instructor? How do these pastors and other NPO leaders understand their role(s) and responsibilities in relation to these elements and dynamics?* |
| In two **FM Analysis Groups**, students will examine and discuss FM documents and dynamics of three other congregations/NPOs selected by the Instructor. *(14 pts)* |
| ***Final***  ***Papers*** | Using the **FM Project Profile** as a basis, prepare an 8-10 page descriptive and reflective paper (**FM Final Paper**) that articulates your grasp of the basic concepts, principles, and issues studied in this course. *(34 pts)* | Drawing upon course readings and group discussion, prepare a 4-5 page **FRS Reflections Paper** that articulates your views about the fund-raising/ stewardship connection, its importance for the mission/vision of congrega-tions/NPOs, and roles/responsibilities of pastors/NPO leaders. *(18 pts)* |

#*schema*: a representation of a plan or theory in the form of an outline or model. For more information about **Bold-face** items, see *Pages* on Canvas. 12.17.2014