

» Fundraising and Nonprofit Organizations

Professional French Masters Program, Spring 2021 Workshop

WORKSHOP OVERVIEW

This workshop will expose PFMP students to topics and concepts related to the financial management and fundraising efforts of nonprofit organizations. Students will acquire a greater understanding of the diversity and scale of nonprofit organizations as well as practice with researching organizations, assessing their financial statements, evaluating the forms of funding available to nonprofit organizations, trends in giving, and constructing campaigns to meet an organization's financial needs.

Workshop Details

Semester: Spring 2021

Facilitator: John Surdyk
E-mail: john.surdyk@wisc.edu
Office: Grainger Hall, 5110C
Virtual Office Hours: By appointment

Materials

Readings and recorded presentations will be provided via the [Canvas](#) workshop website.

Synchronous - Sessions

Friday, 2/5/21 at 12:00 PM - 1:00 PM

Friday, 3/12/21 at 12:00 PM - 1:00 PM

For Modules (asynchronous), the readings will be available no later than Monday for a given week with a narrated slide deck available by Thursday of that week. Assignments are due on Sunday night, midnight, via a dropbox in Canvas.

GOALS OF THIS WORKSHOP

Dimension	Goals
Knowing	<ul style="list-style-type: none"> • understand the scope and role of nonprofit organizations in the economy (United States, E.U.) • identify key elements of effective mission statements at the core of the privileged tax status granted to nonprofit organizations • collect and analyze financial statements for nonprofit organizations • identify the financial role of individuals, foundations, government, and crowdfunding in the nonprofit sector • understand how to research foundations, evaluate annual campaigns fundraising tactics like mailers, and estimate the giving capacity for a private individual donor
Doing	<ul style="list-style-type: none"> • Evaluate mission statements, research organizations' tax filings, assess the financial performance of a nonprofit organization, research foundation prospects, evaluate a mail campaign, evaluate a prospective donor's giving capacity, assess an earned income operation.

CONTACT INFORMATION

You can reach me by email at john.surdyk@wisc.edu. Please put "PFMP" in the subject line. For simple questions, I will typically respond within 48 hours. For more difficult questions, please set up an appointment. I encourage you to stay in contact with me regarding any issues concerning the workshop.

ATTENDANCE

Attendance is expected at the introduction and conclusion of the workshop during the synchronous sessions. Attendance at those events as well as the timelines of submitting analyses during the asynchronous sessions is reported to the PFMP Assistant Director.

WORKSHOP OUTLINE

The workshop outline below is subject to change.

Session	Day	Date	Topic	Key Questions, Topics	Readings, Overview
Synchronous	Fri	2/5/2021	Workshop Introduction	What are the workshop goals and requirements? What is the scope of the nonprofit sector in the United States? How does it compare internationally?	<p>Read. Skim the IRS Publication 557 (pages 65-66, available on Canvas workshop website)</p> <p>We will discuss the magnitude and diversity of nonprofit in the United States with some global comparisons.</p>
			Mission Statements	What role do mission statements play in nonprofit organizations' tax treatment, etc.?	<p>Read. "The Eight Word Mission Statement" by Kevin Starr in <i>Stanford Social Innovation Review</i> (available on the Canvas workshop website).</p> <p>We will discuss elements of effective mission statements and evaluate statements for several organizations.</p>

Session	Day	Date	Topic	Key Questions, Topics	Readings, Overview
Module 1	Sun	2/14/2021	Learning about nonprofit organizations and their financial condition/needs	How can you obtain nonprofit organization information? What are the limits to the availability of filings? What statements do nonprofit organizations produce? How might you monitor an organization's financial condition and assess its need?	<p>Read. None.</p> <p>Listen. An accompanying narrated slide deck will discuss how to obtain data on nonprofit organizations, examine the structure of their financial statements, and construct performance measures using IRS data that allow you to see how the organization funds its operations.</p>
			Practice	Collecting financial information and performing analysis	<p>Do. Identify a nonprofit organization in the United States on guidestar.org and then calculate and interpret its current ratio, days cash on hand, and total margin for its most recent year in the tax filing you pull. An Excel template will be shared with you. Submit via Canvas by Sunday night at midnight.</p>
Module 2	Sun	2/21/2021	Grants	What role do government agencies and foundations play in the nonprofit sector?	<p>Read. "How Nonprofits Get Really Big" by William Foster & Gail Fine and "How Grantmaking Can Create Adaptive Organizations" by Douglas Easterling, both in <i>Stanford Social Innovation Review</i> (available on Canvas workshop website).</p> <p>Listen. An accompanying narrated slide deck will explore the role of these sources of capital for different kinds of organizations and trends in grant giving. It will also introduce resources on campus for doing foundation prospecting.</p>
			Practice	Foundation prospecting	<p>Do. Identify 1 foundation that might be in a position to fund the organization you identified in Module #1 using the resources available at the Grant Information Collection at Memorial Library (online) and the foundation's website. Provide a brief report (1 page) that lists the foundation's name, website address, the median gift it makes to grantees, and briefly explain why you feel the foundation is a fit for the organization. Note, too, if there were major discrepancies between third-party resources like Foundation Directory Online and the foundation's own website. Submit via Canvas by Sunday night at midnight.</p>

Session	Day	Date	Topic	Key Questions, Topics	Readings, Overview
Module 3	Sun	2/28/2021	Individual donations	What role do individuals play in the nonprofit sector? How are annual campaigns and capital campaigns designed?	<p>Read. None.</p> <p>Listen. An accompanying narrated slide deck will explore the role of individual donors and different campaign structures. You will assess the effectiveness of mailers in an annual campaign and learn how to estimate the giving capacity for a high net worth individual in advance of an “ask.”</p>
			Practice	Donor capacity	<p>Do. Identify a high net-worth prospect for the organization you identified in Module #1. The prospect should be someone employed at a publicly-traded company in the United States. Using data collected from the research resources identified in the narrated slides or other credible sources you find (and cite), please evaluate the giving capacity of the prospect using (1) income, (2) real estate holding - primary residence, and (3) if relevant stock sales. Given the variance you see across the calculations using each measure, how much would you ask for from the prospect? Submit via Canvas by Sunday night at midnight.</p>
Module 4	Sun	3/7/2021	Earned income	What role do earned income streams play in nonprofit organizations?	<p>Read. Should Nonprofits Seek Profits” by William Foster and Jeffrey Bradach in <i>Harvard Business Review</i> (Canvas).</p> <p>Listen. An accompanying narrated slide deck will discuss ways that earned revenue streams work in nonprofit organizations.</p>
			Practice	Accurately assess the performance of a new earned income operation in a nonprofit organization.	<p>Do. A mini-case containing a brief description for a new earned income operation will be shared on Canvas. Please read the case and respond to the questions in it. Submit via Canvas by Sunday night at midnight</p>
Synchronous	Fri	3/12/2021	Wrap-up		