This course will examine the challenges facing nonprofit institutions in the contemporary environment. Although nonprofits exist in a variety of areas (e.g. health, environment, social services) we will focus primarily on nonprofits in the fields of history, historical societies, research libraries and museums.

As much as possible the course will be attentive to practical, i.e. real life situations. In class activities and outside assignments will be case based. To that end guest lecturers, each with extensive experience in the nonprofit world, will visit the class.

**Assigned Readings**

Thomas Wolf, *Managing A Nonprofit Organization*

Additional Materials will be provided in class and on Blackboard

There are a vast number of useful websites concerning nonprofit management. You might start with the following:

Guide Star [http://www.guidestar.org/?gclid=CJ2Mk5qJj8MCFdccegQod52sAUA](http://www.guidestar.org/?gclid=CJ2Mk5qJj8MCFdccegQod52sAUA)
Alliance for Nonprofit Management [https://www.google.com/#q=allianceonline.org](https://www.google.com/#q=allianceonline.org)
National Center for Charitable Statistics [https://www.google.com/#q=nccs.urban.org](https://www.google.com/#q=nccs.urban.org)
The Urban Institute [https://www.google.com/#q=urban.org](https://www.google.com/#q=urban.org)
Boston College Center on Wealth and Philanthropy [http://www.bc.edu/research/cwp](http://www.bc.edu/research/cwp)
Associated Grant Makers [http://www.agmconnect.org/](http://www.agmconnect.org/)

**Grading**

<table>
<thead>
<tr>
<th>Institutional Analysis</th>
<th>25 points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Writing assignments (6)</td>
<td>10 points each</td>
</tr>
<tr>
<td>1000 words</td>
<td></td>
</tr>
<tr>
<td>Class Participation</td>
<td>15 points</td>
</tr>
</tbody>
</table>

**Institutional history/analysis**

From the list below, students will select an institution and prepare a paper of no less than 2500 words (Due April 27) addressing the following:
History of institution
Mission
Governance
Challenges faced by institution – internal and external
How have these challenges been addressed?
Current situation (Membership, programs, finances, etc.)
Audience
Outreach programs (e.g. Education)
Future plans

Sources for this exercise should include:
Kevin Guthrie, *The New York Historical Society* (as a guide)
Tax reporting
Incorporation material
Stories in media
Annual Reports
Solicitation material
Interviews where appropriate

In matters of style, *The Chicago Manual* should be consulted.

**Institutions**

Mark Twain House
Museum of American Textile History
Sturbridge Village
Fort Ticonderoga
The Mount – Edith Wharton
Plimouth Plantation
North Shore Music Theater
Boston Athenaeum
Mystic Seaport
Monticello
Mount Vernon
Bostonian Society
Strawbery Banke
Peabody Essex Museum
Rose Art Museum (Brandeis)
American Revolution Center - Philadelphia
New Bedford Whaling Museum
Pilgrim Society
Historic New England
South Street Seaport Museum
New England Historic Genealogical Society

Oral Reports will be presented in class April 2, 9, 16, and 23. Each student will be allotted 30 minutes for presentation. Power Point is encouraged. Final papers must be submitted no later than Friday April 26.

**Guests**

Ms. Sharon Deleskey

Ms. Sharon DeLeskey is the Controller for the Animal Rescue League of Boston. Formerly she was Senior Budget Analyst at Jobs for the Future. Prior to that Ms. DeLeskey was the Controller at the Center for Women and Enterprise and the Massachusetts Historical Society. She has also served on the Audit Committee of the Boston Architectural College for eight years, and the Steering Committee of the Non Profit Financial Managers group for seven years. She received her MBA degree from Simmons College.

Michelle LeBlanc

Michelle LeBlanc has over 15 years of experience in museum and classroom settings, teaching history and designing programming for varied audiences. Since 2013, she has been Director of Education for the Norman B. Leventhal Map Center at the Boston Public Library where she runs all aspects of teacher training, school programming and curriculum development around teaching with historic maps. Previously she served as Project Director for two Teaching American History grants, a federal program that provided professional development for teachers and was designed to connect school
districts with academic researchers and historical institutions to further deepen and enrich the teaching of history. Michelle entered the museum education world working as Program Assistant at the Paul Revere House and also developed programs as Education Director at Historic New England and the Old South Meeting House. She is a licensed middle school teacher and completed her student teaching with 8th graders at Wayland Middle School. She is a proud graduate of the Northeastern Public History program.

January 15

Topic: Introductions
Team Assignments
Overview – Non Profits

Reading:

Blackboard
America’s Nonprofit Sector a Primer

January 22

Topic: History Non Profits in the United States

Reading:
Blackboard:
Statute of Charitable Uses
Historical Overview Non Profits
Town of Concord Tax Exempt
RWEMA to Selectmen

January 29

Topic: Forming a Nonprofit

Reading:
Wolf, – pp. 1-29
Blackboard:
NEQ Legal

Websites:

Federal Government
Check sections:
  Life Cycle
  Exemption Requirements
  Application for recognition

Commonwealth of Massachusetts Secretary of the Commonwealth
http://www.sec.state.ma.us/cor/corpweb/cornp/npfrm.htm

Commonwealth of Massachusetts Attorney General

Questions for discussion:
  What are the steps of forming a 501(c) (3)?
  What is the relationship between State and Federal regulations concerning nonprofits?
  Compare the NEQ 990 with another charity (Your choice but it must have a mission related to history)
  What are the key elements in By Laws?

Writing Assignment
  Write By Laws for the newly formed Town of Reading Historical Society (Due February 5)

February 5

Topic: The Board
Reading:
Wolf, pp. 33-69

Blackboard:
Conflicting Cultures
Board Criteria
When Businessmen Join the Board
Board Responsibilities
Board Chart
Individual Self-Evaluation
Rebellion in Ranks
Questions for discussion:
- How large should a board be?
- What should be the length of a board’s member term?
- What committees should the board have?
- How should committee members be chosen?
- Should chief executive be a member of the board?
- What does it mean to have a diverse board? How do you get it?

Writing Assignment
  Yo Yo Museum (Due February 12)

February 12

Topic: Managing Personnel – Recruiting, Evaluation, Dismissal

Reading:
  Wolf – pp.73-149
  Websites:
  - Massachusetts Commission Against Discrimination
    http://www.mass.gov/mcad/ Pay particular attention to “Employers”
    “Perceptions of Diversity in the Workplace”
    http://www.northeastern.edu/hrm/resources/for-managers/performance-management.html Go to Administrative/Professional Performance Appraisal

Blackboard
BBF Manual
NEMA Manual
Job description

Writing Assignment
  Dr. Semicolon (Due February 19)
  Sexual harassment (Due February 19)

February 19
Guest Mr. Paul McDonough

February 26

Topic: Financial Statements, Audits, Grants
Guest Ms. Sharon Deleskey

Reading:
Wolf, p. 207-233

Websites:
Log on to www.Charitynavigator.com and look up three major Boston Area organizations: The Peabody Essex, the MFA, and the Gardner Museum. Take a look at the analysis that the site does. Note the information that it uses and has available to the public. Read the “Where we are Headed” section in “About Us”.

Log on to www.guidestar.org and look up the Gardner Museum. Create a (free) login and download the latest form 990. Take a look at the information that it contains. Some things to review and note:
- What was the total revenue?
- What were the total expenses?
- What is the largest programming area, how much was spent in it?
- What is the largest Asset?
- What is the largest Liability?
- Between 2008 and 2012 what happened to Public Support?

Closely review section Part VI relating to Governance, Management and Disclosure
Note any two questions and think about why these disclosures are now a required part of reporting.

What three specific policies does the form ask about?

March 5

Topic: Engaging Audiences
Guest: Ms. Michelle LeBlanc

Readings:
What We Do Best: Making the Case for the Museum Learning in its Own Right
http://museumeducation.info/wp-content/uploads/2012/06/jme.v37.n2.FREE.pdf
Museums Expand Their Educational Offerings

http://www.nytimes.com/2012/03/15/arts/artsspecial/museums-expand-their-educational-offerings.html?pagewanted=all&_r=0

Spend some time familiarizing yourself with this terminology you will see connected to interpretation at museums and other institutions and this list of standards and practices for interpretation:

http://www.definitionsproject.com/definitions/media/definitions_list_0107.pdf


Blackboard
Historical Society Adjusts - read

Writing
Penultimate Historical Society (Due March 19)

Annual Appeal Letters distributed

March 12 No Class

March19

Topic: Institutional Advancement (i.e. Fund Raising) Membership, Annual Appeal, Capital Campaign, Endowment

Reading:
Annual Appeal Letters

Blackboard
Donor Bill of Rights
AFP Code of Ethics
How to Raise $500 million
Rebuilding Endowment
Demographic Transformation
Guidelines for Evaluating Promotional Materials
Framingham State Letter
Membership Acknowledgment
NEHGS Capital Campaign
NEH Leventhal Center
Paul Revere Foundation
Class will be divided into teams to report on Annual Appeal Letters distributed in prior class. Be prepared to evaluate these letters according to guidelines on Blackboard. It would be useful to be able to display letters on screen.

Be prepared to discuss:

- Charitable Gift Annuities
- Charitable remainder Trusts
- Charitable Lead Trusts
- Outright Gifts
- Bequests

Writing Assignment

Evaluate Paul Revere Foundation Grant using following criteria:
- Scope
- Soundness of budget/work plan
- Creativity
- Program integration
- Likely impact

March 26

Topic: Program Grants

**Reading**

Website
National Endowment for the Humanities
http://www.neh.gov/grants - peruse

Blackboard
NEH Leventhal

Writing Assignment

Using criteria for Revere evaluate Leventhal proposal. What are major strengths and weaknesses? (Due April 2)

April 2 Catch Up (if no need to “catch up reports will begin – be ready!)

April 9 Institution Reports

April 16 Institution reports

April 23 Institution reports