

# INSTITUTE FOR ORGANIZATION MANAGEMENT

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*2014 Syllabi for Core and Elective Courses*

*Please note: This document is a work in progress designed for the purpose of elaborating on course content. Final adjustments will continue as Institute faculty and volunteers provide input.*

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# Overview of Curriculum

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From membership recruitment and retention to legal issues and finance, Institute offers education on running a nonprofit organization. In addition, its curriculum is aligned with the knowledge requirements for the CAE and CCE nonprofit industry certifications, enabling participants to achieve all their professional goals. In total, participants who complete the four-week program earn 96 credit hours toward their CAE certification or 20 points toward their CCE certification.

The courses at Institute are taught by instructors from various backgrounds, including executives of associations, chambers of commerce, and nonprofits; industry consultants; lawyers and CPAs; and professors. Their in-depth instruction combines practical and academic experience and is designed to help participants explore cutting-edge ideas and best practices to strengthen their organizations.

Both core and elective courses comprise Institute's curriculum.

## Core Courses

During each week of Institute, participants engage in six, three-hour core courses. These courses ensure that all facets of nonprofit management have been covered upon completion of the program.

## Elective Courses

Institute's two-hour elective courses enable participants to delve deeper into specific areas of interest and choose courses tailored to their individual needs. Participants take one elective from each of three groups.

Course curriculum is reviewed and updated annually by the Curriculum Committee using data from course evaluations and feedback from participants and volunteers. Faculty are surveyed after every class for suggestions and content improvements.

The themes for each of the four years are as follows:

## Syllabus Format

- Course Description
- 3 Course Objectives
  - Highlighted in **bold**
  - Must be included in handouts
  - Recommended % time-allotments given
  - Basis for course evaluations
- Tools for Instructor
  - Suggested class exercises
    - Designed to encourage interaction and discussion to enhance students' learning
  - Additional learning opportunities
    - Related core courses and electives

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## C110 Financial Fitness

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### Course Description:

One of the leading reasons for subpar financial performance and job loss in the nonprofit industry is poor financial managerial skills. Don't let this area be the cause of your demise.

### Course topics include:

- **Establishing better comprehensive financial reporting procedures and analysis.**
  - 50%
  - What makes a non-profit organization different from a for-profit company i.e. 501(C)(3) vs. 501(C)(6)
  - Creating clear reports for the board, staff, and members
  - Analyzing income statements and balance sheet statements
  - Touch briefly on budgeting (segue into 3<sup>rd</sup> year Budgeting and the Bottom Line course)
- **Implementing strong internal financial controls and internal control building blocks.**
  - 30%
  - Provide examples and stories around typical problem and high risk control areas
  - Discussion points: What can go wrong? Biggest mistakes.
  - Reality check: Is your organization in danger? Always assume the answer is Yes!
- **Understanding advanced compliance issues related to the Form 990 and governance.**
  - 20%
  - Code of ethics and conflict of interest policy
  - Documentation retention policy
  - Whistleblower policy
  - Board review of Form 990 policy
  - Compensation review and approval policy and process
  - Policy related to minutes for all board and committee meetings
  - Fin. 48 disclosure of compliance with other tax filings and positions
  - Disclosure of fraud if occurred
  - Disclosure of affiliations and joint ventures

### Suggested class exercises:

- Practice analyzing statements
- Form 990 case study

### Additional learning opportunities:

- C310 Budgeting and the Bottom Line
- E210 Executive Finance

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# C125 Hiring, Firing, and Everything In Between

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## Course Description:

Recruiting, retaining, and supporting employees can be among the most difficult and time-consuming duties of any supervisor. Learn techniques for managing employees—from recruitment to separation—and key benefit trends for retention.

## Course topics include:

- **Hiring, orienting, and training top-notch employees.**
  - 40%
  - Writing good, clear position descriptions
  - Recruiting – good, bad, and illegal interview questions
  - Training staff and encouraging professional development
    - Orientation procedures
  
- **Promoting quality work performance.**
  - 40%
  - Auditing jobs and skills (communication, organization, leadership, interpersonal relations, judgment and decision making, and analytical ability)
  - Establishing criteria for performance appraisals
  - Promoting quality of work performance
  - Handling termination
  
- **Ensuring compliance.**
  - 20%
  - Legal documentation
  - Overview of HR laws and regulations

## Suggested class exercises:

- Position description write-up
- Brainstorming good interview questions
- Case study

## Additional learning opportunities:

- C220 Is That Legal?
- E230 Managing Upward

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## C130 Unleash the Leader Within

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### Course Description:

As we manage people, tasks, and our careers, focusing on our personal leadership style sometimes falls to the wayside. Leadership is an integral part of becoming a successful professional. Acquire the skills you need to become the leader you want to be.

### Course topics include:

- **Utilizing tools needed to be a leader.**
  - 33%
  - Describe the leadership environment
  - Key leadership skills and characteristics
  - Understanding the difference between leadership and management
  - Leadership myths and misconceptions
    - Ex: Leaders are born, not made; title or position equals leadership
  
- **Understanding deterrents to successful leadership.**
  - 33%
  - Understanding your weaknesses
  - Ethical challenges
  
- **Identifying styles of effective leaders.**
  - 34%
  - Qualities of successful leaders and different types of leaders (i.e., CEO, manager).
  - Explore how leadership style, follower readiness, and emotional intelligence interact.
  - Understanding your leadership style.

### Suggested class exercises:

- Leadership style test
- Comparing and contrasting managers and leaders
- Share personal best-leadership experiences
- Case study

### Additional learning opportunities:

- C440 Collaborative Leadership

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## C150 Speaking With Confidence

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### Course Description:

Crafting an important message can be a difficult skill to master. Learn to communicate your message whether in the mailroom or boardroom.

### Course topics include:

- **Honing your communication skills.**
  - 40%
  - Tailoring the speech/presentation to meet the needs of your audience
  - Anticipating and handling questions from the audience
  - Overcoming fears & weaknesses
  - Examples of different presentations: PowerPoint, Webinar, etc.
  - Giving testimonies (review briefly)
  
- **Crafting your ideas into messages that resonate.**
  - 40%
  - Basic listening skills
  - Understanding your audience
    - Being sensitive to diversity (e.g. race, ethnicity, gender, religion, age, sexual orientation, nationality, disability, appearance, geographic location, and professional level)
  - Strategies for diagnosing listening preferences
  - Interpersonal and written communication skills
  
- **Building an effective presentation.**
  - 20%

### Suggested class exercises:

- Self-analysis test on listening styles
- Deliver mini-impromptu speeches and mock media interviews

### Additional learning opportunities:

- C260 Marketing Strategies
- E263 Communicating Through the Media
- E350 The Art of Persuasion and Negotiation
- E360 Rethinking Communications

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# C180 Guide to Governance

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## Course Description:

A sound governance structure is needed to ensure success at all levels of an organization. Create a great organization through strong relationships with volunteers.

## Course topics include:

- **Building a solid governance structure.**
  - 40%
  - Is governance structure in line with the mission?
  - Determine board, committee, and task force structure
  
- **Enhancing volunteer support for governance.**
  - 30%
  - Tie into organization mission
  - Helping to create and change governance structure
    - Key tips and best procedures
  - Establishing priorities with volunteer leadership
  - How do you get them on board; developing leadership
  
- **Reviewing key governance documents.**
  - 30%
  - Schedule for review
  - Articles, bylaws, policies
  - Do they reflect current regulatory requirements?
  - Form 990

## Suggested class exercises:

- Ask students to bring a copy of their organization's bylaws and articles to class to review
- Review model governance documents as examples
- Case study

## Additional learning opportunities:

- C380 Volunteer Management
- C440 Collaborative Leadership

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## C185 Recruit, Engage, and Retain Your Members

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### Course Description:

Organizations that retain their members listen to them and exceed their expectations. Identify the myths and realities about keeping members and become familiar with approaches that you can use to deliver products and services to meet members' ever-changing needs.

### Course topics include:

- **Understanding typical member retention rates and patterns.**
  - 30%
  - Recruiting new members
  - Invest in systems, databases and supporting technology to improve efficiency in managing membership (lead-in for technology elective, touch on as intro only)
    - Ex.: track frequency of participation
    - Ex.: focus on top 100 customers who know you and like participating in your programs
  - Cost of member turnover
  - Why members don't return
  - Why members don't complain
  - Target marketing campaign (tie-in to Marketing class)
- **Identifying ways to gauge member needs and satisfaction.**
  - 40%
  - Conduct needs-analysis and environmental scan to determine current members' needs in the context of the chamber's or association's mission and objective
  - Plan and implement recruitment and retention programs based on the strategic plan and results of the needs-analysis
  - Increase member participation
  - Measure member satisfaction
- **Implementing techniques to identify and deliver the products and services your members want.**
  - 30%
  - Identify and implement strategies to continually gather member feedback and to increase member return on investment
  - Customer rewards
  - Best customer program and incentives
  - Customer service basics (lead-in for Customer Service 2<sup>nd</sup> year course)

### Suggested class exercises:

- Success stories from other chambers
- Cost of turnover worksheet exercise
- Survey students on membership status prior to start of class to better tailor presentation
- Case study

### Additional learning opportunities:

- C250 Customer Service Inside and Out

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## C220 Is That Legal?

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### Course Description:

Perhaps the most important part of any job is knowing the law. Don't put your career on the line because you are simply misinformed on legal issues.

### Course topics include:

- **Recognizing corporate and operational legal issues.**
  - 30%
  - Organization and management documents, publications, reports, and other documents in compliance with legal requirements
  - Importance of incorporation versus unincorporation, bylaws, and minutes
  - Employment law
  - How to select legal counsel
- **Identifying areas in which legal problems are most likely to occur.**
  - 30%
  - Insurance coverage
  - Issues in employment law
    - Terminating employees
    - Employment-at-will doctrine
    - Illegal questions to ask when hiring (covered somewhat in C125 Hiring, Firing, and Everything in Between)
    - Sexual harassment
    - Discrimination: the different types and specific laws against
    - Disabilities: what does & doesn't qualify
  - Publications
    - Copyrights
    - Defamation/Libel
    - Invasion of privacy
    - Endorsements
    - Work for hire
- **Understanding legal trends that affect nonprofits.**
  - 40%
  - Taxation
    - Tax exempt status
    - Unrelated business income
    - Advertising income
  - Sarbanes-Oxley
  - Not-for-profit law
  - Form 990
  - Antitrust law
  - Tort liability

### Suggested class exercises:

- Case study

### Additional learning opportunities:

- E220 Executive Law

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## C230 Managers Who Motivate

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### Course Description:

You play an integral part in empowering your colleagues to achieve greatness. Learn how to assess and improve your own management style tailored to the needs of your diverse workforce.

### Course topics include:

- **Developing your personal management style.**
  - 40%
  - Developing a personal action plan for improvement
  
- **Understanding a diverse workforce to effectively reward and recognize employees.**
  - 40%
  - Define “diverse”
    - Ethnic, generational, sexual, racial, religious
  - Create a climate of acceptance, understanding, and respect for diversity
  - Use accountability measures to manage for desired results
  - Recognize different behavior styles and adapt to meet their preferences
  - Explore elements of building strong relationships with others
  
- **Managing conflict and change.**
  - 20%
  - Common pitfalls and how to avoid them
  - Techniques for success
  - The other side of the coin—managing agreement, status quo

### Suggested class exercises:

- Case study

### Additional learning opportunities:

- E230 Managing Upward
- E330 Learning to Let Go

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## C250 Customer Service Inside and Out

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### Course Description:

It is essential to possess a customer service mentality. Discover ways to outline and refine a quality vision statement for your customers to keep them satisfied.

### Course topics include:

- **Defining a customer service vision for your organization or department.**
  - 40%
  - Identify ways to make your organization or department's processes, policies, and procedures conducive to providing exceptional customer service
  - Understand who the customer is, both internally and externally
  - Include a "quality" element
  - Implementing a customer service program
  
- **Earning a reputation for superior customer service.**
  - 40%
  - Benefits of creating loyal members
  - Steps for creating loyal members
  - Setting up a quality assurance program
  
- **Managing customer expectations.**
  - 20%
  - Setting reasonable expectations
  - Identifying how to use positive communication when offering member service
  - How to serve upset members by learning how to calm them
  - How to address abusive members (cover if applicable to attendees)

### Suggested class exercises:

- Self-evaluation test
- Case study

### Additional learning opportunities:

- C185 Recruit, Engage, and Retain Your Members
- E380 Delivering Value

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## C260 Marketing Strategies

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### Course Description:

Learn how to create and implement a marketing plan to promote your organization and community. Find out how to target specific audiences, develop effective one-to-one and one-to-many communications, and assess marketing programs.

### Course topics include:

- **Identifying key elements of a marketing plan.**
  - 40%
  - Learn how to create a marketing plan to promote initiatives, programs, products, and services
  - Review the basics of market segmenting, targeting, and positioning techniques
  
- **Implementing techniques for researching your audience and measuring success.**
  - 40%
  - Build awareness and visibility of the organization through marketing and communications
  - Embrace member and market research as a key organizational driver
  - How to develop and deliver targeted messages about your community or industry
  
- **Utilizing marketing tools for nonprofits.**
  - 20%
  - Use technology in marketing communications (brief lead-in to the Technology course)
  - Gain an appreciation that successful marketing includes the whole organization and supports the organization's long-term plan

### Suggested class exercises:

- Case study

### Additional learning opportunities:

- C460 Integrating Strategic Technology Solutions
- E360 Rethinking Communications
- E140 Building Organizational Excellence

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## C261 Events: Strategy and Operations

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### Course Description:

Events and programs typically bring together a wide range of stakeholders for a specific purpose. Examine events that exceed the needs and expectations of all involved.

### Course topics include:

- **Creating events with a strategic purpose and tactical event planning.**
  - 40%
  - Reevaluating your sacred cows.
  - Does your program align with your overall mission?
  - What's a successful program or event?
  
- **Utilizing technology to effectively reduce costs, reach a larger audience, and streamline processes.**
  - 20%
  - Pricing development based on total costs including staff and overhead.
  - Technologies used throughout the event planning and implementation processes.
  
- **Examining logistical operations, budgeting, and staff time.**
  - 40%
  - Discuss staging an environment that yields success.
  - Key components: venues, evaluations, registration, and atmosphere.

### Suggested class exercises:

- Breakouts

### Additional learning opportunities:

- C360 Innovate or Die
- E140 Building Organizational Excellence
- E380 Delivering Value

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## C270 Effective Government Affairs Programs

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### Course Description:

Nonprofits serve as advocates for their members and communities. Despite your experience or your organization's size, establishing a grassroots network doesn't have to be overwhelming. Learn the basics of a successful approach to legislative advocacy and policy.

### Course topics include:

- **Understanding why nonprofits should be active on the legislative front.**
  - 20%
  - Key benefits
  
- **Creating a legislative policy.**
  - 40%
  - When and how to communicate the policy to elected officials
  - Approaches to advancing your legislative agenda
  
- **Running a grassroots network.**
  - 40%
  - The process of identifying and tracking pertinent legislation
  - How your organization can educate members on political issues

### Suggested class exercises:

- Drafting a policy
- Case study

### Additional learning opportunities:

- C470 Advocacy and Alliances
- E250 Creating a Government Affairs Program

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## C310 Budgeting and the Bottom Line

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### Course Description:

Every organization tries to stretch available dollars as far as possible through wise spending, responsible income forecasts, and sound expense projections. Examine the concepts you need to put together meaningful budget-based financial reports to help you better manage your organization during difficult times.

### Course topics include:

- **Developing program-based budgeting for tracking the real financial results and staying ahead of the curve.**
  - 40%
  - How to get the nonfinancial manager involved
  - Monitoring financial performance
  - Learn how to incorporate projections into the process
  
- **Building a better budget.**
  - 40%
  - Stepping into the process
  - Building ownership and involvement
  - Budget tools and templates
  
- **Exploring other critical budget considerations.**
  - 20%
  - Reserves and reserve policies
  - Capital budgets
  - In-kind contributions and gifts
  - Budgeting for salaries, strategies and tools
  - Contingency budgets
  - Cash flow considerations

### Suggested class exercises:

- Budgeting exercises
- Case study

### Additional learning opportunities:

- C110 Financial Fitness
- E110 Revving Your Revenue Stream
- E210 Executive Finance
- E211 Sponsorship Solicitation

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## C330 Everyday Ethics

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### Course Description:

Become aware of the pitfalls, red flags, and troublesome routine activities to avoid. Learn how to protect your character and your organization.

### Course topics include:

- **Examining how individuals and organizations think, act, and develop policies.**
  - 30%
  - Define ethics and integrity
  - Essential tools to develop values and ethics documents and statements
  
- **Learning how to perform an ethical analysis of an organization.**
  - 30%
  - Developing a code of conduct
  - Performing code of conduct tests
  - Measuring standards
  
- **Determining if structure or policy changes are necessary to avoid ethical conflicts.**
  - 40%
  - Managing unethical behavior
  - Leading with integrity
  - Ethical areas for organizations
    - Membership: dues and qualifications; referrals and bids
    - Leadership qualifications
    - By-Laws: application and consistency
    - Communication
    - Policy positions
    - Personnel
    - Committees
    - Facilities
    - Elections
    - Benefits

### Suggested class exercises:

- Self-analysis or company-analysis
- Case study

### Additional learning opportunities:

- C130 Unleash the Leader Within
- E140 Building Organizational Excellence

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## C340 Strategic Planning

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### Course Description:

Successful organizations plan strategically for the future. By following a few basic principles, your organization can develop a strategic plan to give direction for governance and management.

### Course topics include:

- **Understanding processes for strategic planning.**
  - 30%
  - Develop a focused mission and vision statement
    - Critical elements and characteristics of a mission
    - Brainstorming challenges
    - Communicate to members, staff, public
  - Declaration of principles
  - Goals, strategies, and tactics.
  
- **Implementing strategic planning tools and techniques.**
  - 40%
  - Establish and implement a strategic planning process
  - Discuss trends and methodologies in strategic planning (rolling, strategic plan, balanced score card, etc.)
  - The board retreat
  
- **Translating the strategic plan into action.**
  - 30%
  - Develop a business plan with tactics that advance the strategic goals
  - Systematic structure to monitor and adjust strategies
  - Keeping stakeholders informed of the plan

### Suggested class exercises:

- Best practices; bring sample plans to class
- Examples of mock plan
- Case study

### Additional learning opportunities:

- E140 Building Organizational Excellence

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## C341 Win-Win Partnerships

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### Course Description:

Long- and short-term partnerships with other organizations can help your organization reach community goals that may be unattainable if attempted alone. Form cooperative arrangements with others to pool resources and to achieve great things.

### Course topics include:

- **Understanding the benefits of coalitions and strategic alliances.**
  - 40%
  - What are strategic alliances and coalitions?
  - Key terms
  - Why are coalitions developed?
    - Common reasons why coalitions are formed
    - Major benefits
    - Potential risks
- **Identifying different types of coalitions and alliances.**
  - 20%
  - Areas well-suited for partnering
    - Ex.: legislative, education, special events, publications, research projects, public relations, endorsements, and sponsorships
  - Types of alliances and partnerships
    - Ex.: networking, research, political/public policy, business, technology, and public/private partnerships
  - Building alliances and coalitions within your own chamber
    - Ex.: top investors, CEO's/HR directors, minority businesses, technology companies, and realtors/homebuilders
- **Implementing steps for effective collaboration.**
  - 40%
  - Practical steps for forming and sustaining a coalition
    - Characteristics of effective and successful partnerships
    - Leveraging stakeholder networks for growth
  - Handling problems that may arise
    - When things go wrong
    - Barriers to forming alliances
    - Strategies to minimize barriers
  - Developing international relationships (partnerships, alliances)

### Suggested class exercises:

- Brainstorm potential partnerships and alliances
- Key questions to ask before moving forward with alliances
- Sharing personal experiences
- Case study

### Additional learning opportunities:

- C440 Collaborative Leadership
- C470 Advocacy and Alliances

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# C360 Innovate or Die

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## Course Description:

Organizations compete to show their value and relevance among current and potential members. Learn how to build a creative and innovative culture in your organization. Utilize tools to select the best ideas, evaluate the details, and see the best ideas through.

## Course topics include:

- **Building a creative and innovative culture to generate ideas.**
  - 50% (includes time for the activity at the end of class)
  - A creative and innovative culture:
    - Balanced blend of methodologies, work practices, culture and infrastructure
    - Embraces risks and wild ideas and tolerates the occasional failure
    - Cultivates a culture of innovation and people first
    - Allows time for brainstorming, creativity, and innovation
    - Develops and honors talent, not seniority
    - Strives for, measures, and exceeds quality expectations
  - Ways to create a creative and innovative culture:
    - Infuse creativity and innovation as core values
    - Offer rewards and recognition for new ideas
    - Collect feedback from members and discuss insights with staff
    - Conduct brainstorming sessions to improve on services and generate new ideas for ways to serve members
    - Respect the ‘devil’s advocates’ on staff and listen to different perspectives
    - Invest in developing staff to be more creative and innovative
    - Celebrate innovation with members and in the community
- **Using research to determine your members’ needs and discern the real costs and returns.**
  - 25%
  - Form a plan to review your programs, products, or services periodically
  - Research pertinent information, such as increase sales, reduce costs, and improve operations
    - What can we learn from others?
    - Where can I conduct research and gather data?
    - What is the market potential? Outside factors to consider (competition)?
  - Monitor revenue supply
    - Project-based budgeting (including staff time)
    - Working a step-by-step new product development process
    - Tax issues (royalty vs. unrelated business income)
    - Labor intensiveness vs. financial gain
    - Revenues exceed costs? (cost-benefit)
- **Revitalizing a product, program, service, or even your own organization.**
  - 25%
  - Laying out the proposal and planning the product roll-out
    - Ex.: resources, logistics, audiences, design and content, pilot testing, integration with other programs and services, legality
  - Setting metrics – conduct a new products audit (benchmarking)

## Suggested class exercises:

- To be held on the tail end of the class and lasts 30 minutes (leave 10 minutes at the end of class to wrap up). Divide the class into 3 groups and have them come up with 50 ideas in 30 minutes about what a new type of event called Shmooza Palooza would look like in their organization. Provide each group with flip chart paper to document ideas and other thought provoking items such as magazines, notepads, and markers to help them visualize their ideas. All ideas will be organized/summarized and emailed out to the class after Institute for possible implementation.

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## C380 Volunteer Management

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### Course Description:

It is challenging to attract and retain quality volunteer leaders. Examine leadership and succession programs in nonprofit organizations through strategic volunteer management.

### Course topics include:

- **Developing volunteer leadership.**
  - 30%
  - Ensure that volunteer leadership represent the diversity of the membership
    - Ex.: type of businesses, age, gender, ethnicity, geography (CAE)
  - Create opportunities for members to participate in activities and advancement
    - Ex.: focused, short-term volunteer opportunities; committee participation, leadership roles
  - Educate and orient board members, volunteers, and staff regarding their roles and responsibilities
  
- **Implementing successful strategies to recruit organizational leadership.**
  - 50%
  - Develop a list of available positions
  - Maintain an appropriate volunteer recruitment, training, recognition, and accountability system
  - Discuss procedures to recognize, reward, and hold volunteers accountable
  
- **Building a volunteer structure for future leaders to emerge.**
  - 20%
  - Establish a succession plan for volunteer leadership
  - Develop volunteer-staff partnership models
  - Sound training
  - Motivate

### Suggested class exercises:

- Case study

### Additional learning opportunities:

- C180 Guide to Governance
- E180 Orientation for Board Success

---

## C430 Becoming a Strategic Manager

---

### Course Description:

Management is one thing; becoming a strategic manager takes you to the next level. Strategic managers think for the future and strive to develop others and prepare teams to function for what's ahead.

### Course topics include:

- **Understanding leadership trends for strategic managers.**
  - 33%
  
- **Training staff and volunteers to enhance their leadership potential.**
  - 33%
  - Understanding training and development needs
  - Providing a variety of development options appropriate for staff and volunteers
  - Focusing on strengths instead of weaknesses
  - Ensuring transfer of learning
  - Mentoring as a leadership development tool
  
- **Building dynamic teams for success.**
  - 34%
  - Key factors of successful teams
  - Teams versus work groups and identifying barriers to teamwork
  - Encouraging, understanding, and maximizing the power of all types of diversity

### Suggested class exercises:

- A real workplace problem to solve
- A team effectiveness assessment
- Case study

### Additional learning opportunities:

- C125 Hiring, Firing, and Everything in Between
- C230 Managers Who Motivate
- C380 Volunteer Management
- E140 Building Organizational Excellence

---

## C440 Collaborative Leadership

---

### Course Description:

Maximize your organization's potential and create a synergistic environment through trust, appropriate culture, and the ability to affect change.

### Course topics include:

- **Building trust and relationships for success.**
  - 33%
  - Understanding the impact and types of trust in the workplace
  - Tools to use to build trust
  - Developing relationships and strategic networks across organizational boundaries for successful collaborations
  - Promoting a climate of trust in the community/profession
  
- **Developing a culture of leadership.**
  - 33%
  - Understanding the pros and cons of different organizational cultures
  - Promoting a culture that is sensitive and responsive to the needs, interests, and values of the membership
  - Tools to sustain a leadership culture
  
- **Implementing techniques to lead change.**
  - 34%
  - Understanding your change style
  - Key success factors for affecting change
  - Taking the vision and mission of the organization forward
  - Being a champion of change for others and dealing with resistance to change

### Suggested class exercises:

- A culture survey
- A change style assessment
- A case study of collaboration across communities – logistical or professional

### Additional learning opportunities:

- C130 Unleash the Leader Within
- C330 Everyday Ethics
- C340 Strategic Planning
- C341 Win-Win Partnerships
- E230 Managing Upward
- E240/241 Strong Associations/Chambers for the Future

---

## C441 Industry Forecast

---

### Course Description:

Is your organization ready for the future? Explore trends and issues affecting the nonprofit world and prepare for the future.

### Course topics include:

- **Discovering essential industry trends.**
  - 33%
  - Environmental/societal trends
  - Industry trends
  - Globalization
  - Consolidations and mergers
  - Workforce changes
  - Outsourcing and co-sourcing
  - Competition vs. alliances
  
- **Understanding how the changing complexities of the global market affect your members.**
  - 33%
  - What, how, when?
  
- **Exploring the technology horizon.**
  - 34%
  - What, how when?
  - Web-based communications and outreach

### Suggested class exercises:

- Case study

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## C460 Integrating Strategic Technology Solutions

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### Course Description:

Integrating a dynamic website, contact database, and accounting program is essential in doing business today. Take the necessary steps to further develop a technology plan that works for your organization.

### Course topics include:

- **Creating a technology plan and budget.**
  - 50%
  - Understanding what technology toolset (i.e., information systems, databases, communication technologies, web technologies) is needed to support association goals and activities (CAE)
  - Plan for implementation issues, staff issues, and culture change issues
  - Weighing the costs, benefits, and return on investment of technology solutions.
  
- **Developing technology strategies for your organization.**
  - 25%
  
- **Protecting and maintaining your technology solutions.**
  - 25%
  - Identify areas in which new technology tools can improve design, development, and delivery of products and services (CAE)
  - Understand the pros and cons of Web 2.0/Social Networking tools
  - What's new

### Suggested class exercises:

- Case study

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## C470 Advocacy and Alliances

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### Course Description:

Once your advocacy program is in place, you are ready to take the next steps. Delve into the ins and outs of the different channels of coalition building, grassroots management, political endorsements, and election activity.

### Course topics include:

- **Developing political coalitions and alliances.**
  - 50%
  - Campaign activities
  - Building coalitions
  - Finding issues in common
  - Preparing issue papers and other materials
  - Grassroots networks
  
- **Building an airtight endorsement strategy.**
  - 30%
  - Political endorsements
    - Are they right for you?
  - Developing and maintaining written criteria for endorsement process
  - Consistently applying process
  
- **Strategizing for advancing your legislative agenda, including eAdvocacy.**
  - 20%
  - Creating and maintaining a PAC
    - State and federal rules
  - Gaining the support of your board
  - Election activity

### Suggested class exercises:

- Case study

### Additional learning opportunities:

- C270 Effective Government Affairs Programs
- E250 Creating a Government Affairs Program

---

## C490 IOM and Beyond

---

### Course Description:

Review your Institute experience and discuss professional development through a roundtable discussion with your peers. Learn what exists beyond Institute, as well as ways to stay involved in the program.

### Course topics include:

- **Exploring avenues for professional certification.**
  - 25%
  - Take sample CAE or CCE exam under real-life testing conditions
  - Review answers
  - Discuss certification process
  
- **Understanding proper work-life balance.**
  - 25%
  
- **Recognizing IOM lessons learned and applied.**
  - 50%
  - Institute overview
  - Volunteering
    - Class advisors, board

### Suggested class exercises:

- Share experiences
- Sample CAE or CCE exam

---

## E110 Revving Your Revenue Stream

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### Course Description:

Identify new ways to fundraise, sponsor, and build partnerships to bring revenue into your organization. Learn the steps involved to establish partnerships, including due diligence and safeguards to protect your organization and its members.

### Course topics include:

- **Discovering avenues to bring revenue into your organization.**
  - 40%
  - Grant Writing
  
- **Examining potential new sources of non-dues revenue through creative funding.**
  - 40%
  
- **Understanding the financial and legal implications associated with different revenue streams.**
  - 20%

### Suggested class exercises:

- Quick 10 minute brainstorming/idea exchange session

### Additional learning opportunities:

- C110 Financial Fitness
- C341 Win-Win Partnerships
- E211 Sponsorship Solicitation

---

## E120 Executive Law

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### Course Description:

There are many situations in which your organization might be found legally responsible. Examine common areas of risk for nonprofit membership organizations and discuss strategies to manage liability risk.

### Course topics include:

- **Recognizing issues that land a nonprofit professional in legal trouble.**
  - 30%
  - Common hazard situations and how to avoid them.
  
- **Implementing safeguards to protect your organization.**
  - 40%
  - Duty of care, duty of loyalty, and duty of obedience.
  
- **Managing roles and responsibilities of the board, committees, and task forces.**
  - 30%

### Additional learning opportunities:

- C220 Is That Legal?

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## E126 Dealing with Challenging Employees

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### Course Description:

Handling difficult employee situations can be one of the most tedious and anxiety-producing aspects of management. By handling such situations effectively, it is often possible to turn a difficult situation into a great one.

### Course topics include:

- **Defining unsatisfactory employee performance behaviors.**
  - 40%
  
- **Learning tools and techniques to address problematic staff behavior.**
  - 30%
  
- **Identifying actionable steps if you can't turn it around.**
  - 30%

### Suggested class exercises:

- Position description write-up
- Brainstorming good interview questions
- Case study

### Additional learning opportunities:

- C220 Is That Legal?
- E230 Managing Upward

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## E140 Building Organizational Excellence

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### Course Description:

Excellent organizations begin with integrity. Dig deep within your organization to find the core values to surpass expectations.

### Course topics include:

- **Identifying the principles and best practices of successful organizations.**
  - 25%
  - Characteristics of successful organizations
  
- **Benchmarking your organization's performance against the standards of other top organizations.**
  - 50%
  - Suggested metrics
  - Conducting an organizational assessment (tie-in to elective class)
    - What is an assessment?
    - Why perform an assessment?
    - Accreditation?
  - Internal: staff, board, volunteers
  - External: members, community, prospects
  - Outlining desired results
  - Performing a SWOT analysis
  - Organizational climate assessments
    - Surveys, questionnaires, open forums, focus groups
  
- **Implementing best practices.**
  - 25%
  - Provide examples or case studies

### Suggested class exercises:

- Case study (of a dysfunctional organization, then test knowledge learned)
- Benchmarking activity
- Examples of best practices in chambers and associations

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## E142 Fundamentals of Community and Economic Development

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Course Description:

Learn the fundamentals of community and economic development to enhance your organization's relevance.

Course topics include:

- **Defining economic development, including the various types and forms.**
  - 50%
  
- **Developing existing business retention and expansion programs.**
  - 25%
  
- **Building collaborative economic development relationships and receiving examples of funding structures for economic development organizations.**
  - 25%

Additional learning opportunities:

- E342 Advanced Strategies of Community and Economic Development

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## E161 Technology Trends and Tools

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Course Description:

Keeping up with technology can be challenging in any industry. Discover the latest trends in Web-based communications to effectively and efficiently grab the attention and esteem of your members.

Course topics include:

- **Understanding current trends in technology.**
  - 30%
  
- **Preparing your staff for future technology.**
  - 50%
  
- **Reaching your audience with the latest technology tools.**
  - 20%

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## E180 Building Better Boards and Committees

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### Course Description:

Orientation sessions set the tone for new boards and create opportunities for them to operate cohesively. Learn the essential elements of a successful orientation and techniques to motivate your board.

### Course topics include:

- **Structuring a board or committee orientation.**
  - 40%
  - Determining specific goals and outcomes of the orientation
  - Basic teambuilding techniques
  - What to put in a board orientation packet (e.g., job description, organization structure)
  - Basic team building
  - Where, When, How, and when to use an outside facilitator
  
- **Setting expectations for board or committee members.**
  - 40%
  - Communicating the right roles and responsibilities
  - Setting expectations of volunteers
  - How to hold board members accountable
  - Tips on securing time and financial commitments from new directors
  
- **Coaching the board or committee to think strategically.**
  - 20%

### Suggested class exercises:

- Sample ice breakers
- Discussion of board size, governance styles and challenges
- Bring sample based orientation manual to class

### Additional learning opportunities:

- C180 Guide to Governance
- C380 Volunteer Management

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## E210 Executive Finance

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### Course Description:

Executives who ignore key financial compliance issues can end up with unanswered questions in front of the board, empty corporate accounts, fired, or even jailed. This course covers advanced compliance and financial issues to keep you out of trouble.

### Course topics include:

- **Identifying and documenting unrelated business income tax.**
  - 20%
  - What is UBIT (unrelated business income tax)?
  - Definitions
  - Examples
  - Excluded Activities
  - Sponsorships Vs Advertising
  - Internet
  
- **Recognizing how audits have changed in recent years and how to be better prepared to meet the new standards.**
  - 20%
  - Finding an auditor
  - Audit committees
  - Audit reports:
  - Opinion
  - Internal Controls (SAS 112 Letter)
  - Required Communications (SAS 114 Letter)
  
- **Understanding the impact of the Form 990 on your organization.**
  - 60%
  - Over View of Federal Forms:
    - Form 990N
    - Form 990EZ
    - Form 990

### Suggested class exercises:

- Form 990 case study

### Additional learning opportunities:

- C110 Financial Fitness
- C220 Is That Legal?
- C310 Budgeting and the Bottom Line

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## E211 Sponsorship Solicitation

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### Course Description:

Sponsoring events, publications, and programs can be a significant source of revenue. Learn how to structure sponsorship opportunities, develop a price, and solicit the right organizations to meet your goals.

### Course topics include:

- **Developing sponsorship pricing structures, factors, and packaging.**
  - 30%
  - Difference between sponsorship and advertisements
  
- **Identifying the right organizations to solicit sponsorship.**
  - 30%
  - Building partnerships to improve sponsor relations
  
- **Making the sponsorship sales pitch and showing the return on investment.**
  - 40%
  - Sponsorship menu

### Suggested class exercises:

- Share unique approaches to selling

### Additional learning opportunities:

- E110 Revving your Revenue Stream

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## E230 Managing Upward

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### Course Description:

You are in charge of your performance and career development. Discover new ways of working with your supervisor to build cooperation and achieve success that benefits both of you.

### Course topics include:

- **Understanding your manager and building the relationship.**
  - 40%
  - Basic communication tips
  - Finding common ground
  
- **Developing your value to your organization.**
  - 30%
  
- **Building trust with your manager.**
  - 30%

### Suggested class exercises:

- Role playing

### Additional learning opportunities:

- C130 Unleash the Leader Within
- C150 Speaking with Confidence
- C230 Managers Who Motivate
- E350 The Art of Persuasion and Negotiation

---

## E240 Strong Associations for the Future\*

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### Course Description:

Government regulation, technology, public trust, volunteerism, and a host of other issues affect the relevance and viability of associations. Become aware of key trends and issues that impact associations and discuss steps to ensure the future of the association industry.

### Course topics include:

- **Examining marketplace trends in the association industry—income, revenue, and membership metrics.**
  - 33%
  - Causes
  - Implications
  
- **Identifying shifts in trends to ensure that your organization stays ahead of the curve and delivers member value.**
  - 33%
  
- **Investigating innovative programs, governance, and operating procedures of trailblazing associations.**
  - 34%
  - Discuss potential gains of groundbreaking practices as well as the risks involved
  - Tips on implementing creative solutions to problems
  - Innovative programs from associations
  - The benefits and risks of innovative programs

### Suggested class exercises:

- Brainstorming
- Case study of trailblazing associations

### Additional learning opportunities:

- C441 Industry Forecast

\*Offered only at Midwest, Northeast, and Winter sites.

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## E241 Strong Chambers for the Future

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### Course Description:

Government regulation, technology, public trust, volunteerism, and a host of other issues affect the relevance and viability of chambers. Become aware of key trends and issues that impact chambers and discuss steps to ensure the future of the chamber industry.

### Course topics include:

- **Understanding income, membership, and competitive marketplace trends in the chamber industry.**
  - 40%
  - Causes
  - Implications
  
- **Identifying shifts in trends to ensure that your organization stays ahead of the curve and delivers member value.**
  - 20%
  
- **Examining innovative programs, governance, and operating procedures of trailblazing chambers.**
  - 40%
  - Discuss potential gains of groundbreaking practices as well as the risks involved
  - Tips on implementing creative solutions to problems
  - Innovative programs from chambers of commerce
  - The benefits and risks of innovative programs

### Suggested class exercises:

- Brainstorming
- Case study of trailblazing chamber

### Additional learning opportunities:

- C441 Industry Forecast

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## E243 Developing a Competitive Workforce

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### Course Description:

Employers across the nation agree that a qualified and well-trained workforce is key to sustained growth and competitiveness. Learn the various roles your organization can play in this arena and the resources you can tap.

### Course topics include:

- **Understanding workforce development activities and terminology.**
  - 25%
  - Basic concepts
  - Recent legislative activity
  
- **Identifying common initiatives and roles of chambers in workforce development.**
  - 40%
  - Key trends
  - How can your organization make an impact
  - Partnering with local government and neighboring community initiatives
  
- **Exploring resources to assist you in your workforce development program.**
  - 30%
  - USCC/ICW resources

### Additional learning opportunities:

- C261 Events: Strategy and Operations
- C270 Effective Government Affairs Programs
- C360 Innovate or Die
- C441 Industry Forecast

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## **E244 Using Data to Grow and Sustain Your Organization**

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### Course Description:

The flow of knowledge is a competitive advantage. This course explores a people-first and principle-centered approach to leverage knowledge in nonprofits.

### Course topics include:

- **Evaluating relationship management systems and information that should be captured.**
  - 40%
  
- **Understanding how to link member data and forecast trends.**
  - 40%
  
- **Developing and analyzing data through surveys and other research tools.**
  - 20%

### Additional learning opportunities:

- C185 Recruit, Engage, and Retain Your Members
- E380 Delivering Value

---

## E250 Creating a Government Affairs Program

---

### Course Description:

Step-by-step instruction on how to establish a successful government affairs program using communication vehicles

### Course topics include:

- **Identifying who should be involved in the program.**
  - 33%
  - Members
  - Government Relations committee board
  
- **Understanding potential issues to be addressed, including structuring a legislative agenda.**
  - 34%
  - Needs assessment
  - White paper spokesperson
  - Grassroots network
  
- **Accounting for the legal, financial, regulatory, and political implications.**
  - 33%
  - Political activity vs. Legislative activity
  - PAC's
  - Endorsements

### Suggested class exercises:

- Pick your Government Relations committee
- Pick your current issues for the survey

### Additional learning opportunities:

- C270 Effective Government Affairs Programs
- C470 Advocacy and Alliances

---

## E263 Communicating Through the Media

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### Course Description:

There are times when you want or need to be out front on an issue and times when the best defense is a good offense. Learn how to maximize, or minimize, attention on an issue or event with the media.

### Course topics include:

- **Understanding the vehicles for sending your message.**
  - 35%
  
- **Communicating your message with impact to different media outlets.**
  - 35%
  
- **Messaging with maximum preparation.**
  - 30%

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## **E270 Passport to Global Business\***

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### Course Description:

Hundreds of thousands of businesses and local communities in the United States are tied to the international marketplace. Become a resource to your members and learn how international trade relates to jobs, growth, and increasing revenue – all of which are critical to keeping your organization and theirs relevant in a new era of global business.

### Course topics include:

- **Examining ways your community and membership are affected by international business.**
  - 40%
  - Learn about the myths and facts of trade, and how international business is happening and growing communities across the country.
  - How trade policy can increase local economic development and foreign investment.
  - How to deal with organized opposition to international business.
  
- **Understanding educational tools your organization needs to provide to its members.**
  - 30%
  - Learn how to create a revenue stream out of international business through trade missions, certificates of origin, programming, etc.
  - How to communicate effectively with lawmakers at the federal, state, and local levels regarding the impact of global trade on communities.
  
- **Exploring available resources to help build an international program.**
  - 30%
  - What are the resources available and partners to engage in order to build an international program.
  - How can the government be helpful and provide assistance on a local level.
  - What are other organizations doing to add value to membership.

### Additional learning opportunities:

- C270 Effective Government Affairs Programs
- C470 Advocacy and Alliances

\*Currently not offered.

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## E310 Dues and Don'ts

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### Course Description:

Do you plan to reevaluate or restructure your organization's membership investment schedule? This session looks at the major issues in developing a dues schedule and the approaches that different organizations use.

### Course topics include:

- **Evaluating advantages and risks of various dues schedules.**
  - 25%
  
- **Identifying steps for conducting a review of your organization's dues structure.**
  - 50%
  
- **Implementing techniques to ensure smooth implementation of a dues schedule change.**
  - 25%

### Additional learning opportunities:

- C310 Budgeting and the Bottom Line

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## E330 Learning to Let Go

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### Course Description:

The stress that comes from being responsible and accountable for performance can hinder success and job satisfaction. Delegation gives others a greater stake in organizational outcomes and can increase productivity. Explore strategies for empowering others to assume more responsibility.

### Course topics include:

- **Identifying what and what not to delegate.**
  - 25%
  - Steps of delegation
  - Barriers to effective delegation
  - Frequent errors in delegation with impacts and remedies
  
- **Understanding how to delegate to the right person at the right time.**
  - 50%
  - Are they ready to listen?
  
- **Implementing ways improve staff accountability.**
  - 25%
  - Tips and tools
  - How to develop evidence based performance measures to ensure performance aligns with expectations

### Suggested class exercises:

- Create a delegation checklist/plan involving current staff

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## E331 CEO Lessons Learned

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### Course Description:

Learn how to thrive as a nonprofit executive. Gain insight and refinement as an executive in the industry. Tips, lessons, and stories are captured and shared during this interactive session.

### Course topics include:

- **Sharing best practices.**
  - Capture and share advice and insights.
  - What I learned the hard way.
  - Simple do's and don'ts
  - 40%
  
- **Exploring habits and behaviors of nonprofit executives, from challenges to everyday opportunities.**
  - 30%
  
- **Exploring habits and behaviors of nonprofit executives, from challenges to everyday opportunities.**
  - Dialogue on stages and phases of one's career.
  - Inventory arenas of personal growth.
  - Skills for the future.
  - 30%

### Suggested class exercises:

- Facilitated discussion of major oops and faux pas.

### Additional learning opportunities:

- C490 IOM and Beyond

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## **E340 Building Exceptional Staff and Teams\***

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Course Description:

The growing number of management support services has radically changed the human resource needs of nonprofits. Learn strategies to revitalize your organization, including reengineering staff responsibilities, outsourcing, and partnering to achieve goals.

Course topics include:

- **Understanding your team – motivation, strengths, and weaknesses.**
  - 33%
  - Existing talent base
  - Workforce composition
  - Identifying gaps
  - Downsizing
  
- **Blending institutional knowledge with youth and new ideas.**
  - 34%
  - Determining staffing costs
  - Determining Staff vs. Volunteer Roles and Responsibilities
  
- **Knowing what and when to outsource.**
  - 33%
  - Staffing options

Suggested class exercises:

- Calculate the cost of turnover
- Staffing assessment

Additional learning opportunities:

- C125 Hiring, Firing, and Everything in Between
- C230 Managers Who Motivate
- C310 Budgeting and the Bottom Line

\*Currently not offered.

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## E342 Advanced Strategies of Community and Economic Development

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Course Description:

Expand your organization's role in economic development and learn strategies to compete globally.

Course topics include:

- **Structuring a deal, identification, and use of incentives**
  - 33%
  
- **Understanding redevelopment, revitalization, and regionalism.**
  - 34%
  
- **Utilizing technology in economic development.**
  - 33%

Additional learning opportunities:

- E142 Fundamental Strategies of Community and Economic Development

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## E350 The Art of Persuasion and Negotiation

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Course Description:

Persuasion and negotiation require patience and determination. Learn to shift opinions through key people, case studies, power words, and presentations. Convince others to step up and take on new initiatives. Learn how to obtain the results you want through negotiation.

Course topics include:

- **Understanding the types of decision makers and how they can be most effectively persuaded.**
  - 25%
  
- **Identifying words and techniques to convince others to take action.**
  - 50%
  
- **Implementing a plan of action for negotiations.**
  - 50%

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## E360 Rethinking Communications

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### Course Description:

Your communications plan needs to effectively convey organization products, programs, and services. Learn to evaluate your communications and marketing plans to ensure that your organization is properly branded to reach its critical audience.

### Course topics include:

- **Writing and evaluating an effective communications plan.**
  - 25%
  
- **Targeting the right audience for various communications efforts.**
  - 25%
  
- **Determining the appropriate brand within the market.**
  - 50%

### Additional learning opportunities:

- C150 Speaking with Confidence
- C260 Marketing Strategies
- E263 Communicating Through the Media

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## E362 Policy Development and Implementation

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### Course Description:

Policies and procedures exist to protect the organization and the professionals within it. Determine the differences between policies and procedures and learn how to implement an appropriate structure in your organization.

### Course topics include:

- **Identifying differences between policies and procedures.**
  - 35%
  - Distinguishing policies from procedures, positions, practices and precedents
  - Process for policy development
  
- **Exploring the process for implementing policies.**
  - 35%
  - Archiving policies for quick reference
  - Policy mistakes
  - Policy process
  
- **Understanding risk management.**
  - 30%
  - Policies as a form of risk management
  - The most common policies among organizations
  - The IRS policy recommendations

### Additional learning opportunities:

- C180 Guide to Governance

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## E380 Delivering Value

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### Course Description:

Nonprofit organizations face an increasingly competitive market for members and customers. Learn how to develop your organization's value proposition and convey the significance of your services to current and prospective members and customers.

### Course topics include:

- **Identifying your value proposition.**
  - 50%
  - Students should be able to gain a clear understanding of what their organization's value proposition is
  - Golden handcuff principle
  
- **Communicating your value proposition.**
  - 25%
  - Determine the best way to communicate value to your members
  
- **Measuring your value proposition.**
  - 25%
  - Why you can't be all things to all people
  - Hedgehog theory – focus on what you know best and what you are good at

### Suggested class exercises:

- Group exercise – practice identifying, communicating, and measuring value proposition

### Additional learning opportunities:

- E360 Rethinking Communications
- C185 Recruit, Engage, and Retain Your Members