

# INSTITUTE FOR ORGANIZATION MANAGEMENT

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*2018 Syllabus 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.*

# TABLE OF CONTENTS

<b>OVERVIEW OF CURRICULUM .....</b>	<b>1</b>
<b>FIRST-YEAR COURSES</b>	
<i>C110 - Financial Fitness .....</i>	<i>2</i>
<i>C125 - Hiring, Firing, and Everything In Between .....</i>	<i>3</i>
<i>C130 - Unleash the Leader Within .....</i>	<i>4</i>
<i>C150 - Communicating With Confidence.....</i>	<i>5</i>
<i>C180 - Guide to Governance.....</i>	<i>6</i>
<i>C185 - Recruit, Engage, and Retain Your Members .....</i>	<i>7</i>
<b>SECOND-YEAR COURSES</b>	
<i>C220 - Is That Legal?.....</i>	<i>8</i>
<i>C230 - Managers Who Motivate .....</i>	<i>9</i>
<i>C250 - Customer Service Inside and Out .....</i>	<i>10</i>
<i>C260 - Marketing Strategies.....</i>	<i>11</i>
<i>C261 - Events: Strategy and Operations.....</i>	<i>12</i>
<i>C270 - Effective Government Affairs Programs.....</i>	<i>13</i>
<b>THIRD-YEAR COURSES</b>	
<i>C310 - Budgeting and the Bottom Line.....</i>	<i>14</i>
<i>C330 - Everyday Ethics.....</i>	<i>15</i>
<i>C340 - Strategic Planning.....</i>	<i>16</i>
<i>C341 - Win-Win Partnerships .....</i>	<i>17</i>
<i>C360 - Innovate or Die.....</i>	<i>18</i>
<i>C380 - Volunteer Development .....</i>	<i>19</i>
<b>FOURTH-YEAR COURSES</b>	
<i>C420 - Current Legal Issues Facing Your Organization.....</i>	<i>20</i>
<i>C430 - Becoming a Strategic Leader .....</i>	<i>21</i>
<i>C441 - Industry Forecast .....</i>	<i>22</i>
<i>C460 - Integrating Strategic Technology Solutions.....</i>	<i>23</i>
<i>C470 - Advocacy and Alliances.....</i>	<i>24</i>
<i>C490 - Organization Leadership for the Future .....</i>	<i>25</i>
<b>GROUP ONE ELECTIVES</b>	
<i>E110 - Revving Your Revenue Stream.....</i>	<i>26</i>
<i>E120 - Executive Law.....</i>	<i>27</i>
<i>E126 - Dealing with Challenging Employees.....</i>	<i>28</i>
<i>E140 - Building Organizational Excellence .....</i>	<i>29</i>
<i>E142 - Fundamentals of Community and Economic Development .....</i>	<i>30</i>
<i>E161 - Business Communication Technology Trends .....</i>	<i>31</i>
<i>E163 - Communicating through the Media.....</i>	<i>32</i>
<i>E180 - Building Better Boards and Committees .....</i>	<i>33</i>
<b>GROUP TWO ELECTIVES</b>	
<i>E210 - Executive Finance.....</i>	<i>34</i>
<i>E211 - Sponsorship Solicitation.....</i>	<i>35</i>
<i>E230 - Managing Upward.....</i>	<i>36</i>
<i>E240 - Strong Associations for the Future.....</i>	<i>37</i>
<i>E241 - Strong Chambers for the Future .....</i>	<i>38</i>
<i>E243 - Developing a Competitive Workforce.....</i>	<i>39</i>
<i>E244 - Using Data to Grow &amp; Sustain Your Organization .....</i>	<i>40</i>
<i>E250 - PACs and Political Endorsements.....</i>	<i>41</i>
<b>GROUP THREE ELECTIVES</b>	
<i>E310 - Dues and Don'ts .....</i>	<i>42</i>
<i>E330 - Learning to Let Go.....</i>	<i>43</i>
<i>E331 - CEO Lessons Learned .....</i>	<i>44</i>
<i>E340 - 501C3 Foundations.....</i>	<i>45</i>
<i>E342 - Advanced Strategies of Community and Economic Development .....</i>	<i>46</i>
<i>E350 - The Art of Persuasion and Negotiation.....</i>	<i>47</i>
<i>E360 - Strategic Communications.....</i>	<i>48</i>
<i>E362 - Policy Development and Implementation.....</i>	<i>49</i>
<i>E380 - Delivering Value.....</i>	<i>50</i>

# Overview of Curriculum

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 28 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 college 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.

## Syllabus Format

- Course Description
- 3 Course Objectives
  - Recommended percentage of time allotment
- Suggested class exercises
- Additional learning opportunities

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# C110 Financial Fitness

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## Course Description:

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

## Course Objectives:

- **Establishing better comprehensive financial reporting procedures and analysis.**
  - 50%
  - What makes a non-profit organization different from a for-profit company
  - What is Unrelated Business Income Tax? (UBIT)
  - Explore the key differences between 501(C)(3) vs. 501(C)(6) exempt status
  - Analyzing balance sheet statements and income statements
  - Learn how to read financial statements and increase your financial communication skills and assess for result and trends that impact sustainability and financial health
  - Touch briefly on budgeting and reporting to the board staff and members (segue into C310 Budgeting and the Bottom Line course)
  
- **Gaining a better understanding of key compliance issues of Federal Form 990 impacting your organization and learn how to tell “Your Good Story.”**
  - 35%
  - Overview of federal forms:
    - Form 990N
    - Form 990EZ
    - Form 990 (core form 12 pages)
  
- **Understanding advanced compliance issues related to the Form 990 and governance.**
  - 15%
  - 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
  - Disclosure of affiliations and joint ventures
  - Other related governance policies and disclosures

## Suggested class exercises:

- Practice analyzing statements
- Form 990 interactive class analysis

## 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 Objectives:

- **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
  
- **Evaluating 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 and effective steps for separation.**
  - 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
- E126 Dealing With Challenging Employees

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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 Objectives:

- **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

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# C150 Communicating With Confidence

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## Course Description:

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

## Course Objectives:

- **Honing your verbal and non-verbal communication skills.**
  - 40%
  - Tailoring the speech/presentation to meet the needs of your audience
  - Anticipating and handling questions from the audience
  - Overcoming fears and weaknesses
  
- **Delivering your ideas as messages that resonate.**
  - 40%
  - Storytelling
  - Crafting an effective message
  - 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
  
- **Building an effective presentation.**
  - 20%
  - Effective use of PowerPoint

## Suggested class exercises:

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

## Additional learning opportunities:

- C260 Marketing Strategies
- E163 Communicating Through the Media
- E350 The Art of Persuasion and Negotiation
- E360 Strategic 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 Objectives:

- **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 Development



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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 Objectives:

- **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 C260 Marketing Strategies)
  
- **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: models and trends
  - 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 C250 Customer Service Inside and Out)

## Suggested class exercises:

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

## Suggested Reading Material

- *10 Lessons for Cultivating Member Commitment* by James Dalton and Monica Dignam

## 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 Objectives:

- **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 and doesn't qualify
    - Immigration
  - 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
  - Apparent authority
  - Conflict of interest
  - Board issues

## Suggested class exercises:

- Case study

## Additional learning opportunities:

- E120 Executive Law
- C420 Current Legal Issues Facing Your Organization

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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 Objectives:

- **Developing your personal management style.**
  - 40%
  - Developing a personal action plan for improvement
  
- **Setting expectations and coaching your team.**
  - 33%
  - Establishing core values for your team
  - Recognize different behavior and communication styles and adapt
  - Coaching techniques to help your team reach its potential
  
- **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
- C430 Becoming a Strategic Leader

### Suggested resource:

- ASAE and ACCE Diversity and Inclusion statements

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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 Objectives:

- **Learning to cultivate a customer service vision within your organization.**
  - 33%
  - 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.**
  - 33%
  - Benefits of creating loyal members
  - Steps for creating loyal members
  - Setting up a quality assurance program
  
- **Understanding and managing customer expectations.**
  - 34%
  - 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 Objectives:

- **Identifying key elements of a marketing plan.**
  - 40%
  - Learn how to develop strategies to market what your organization offers (services, programs, events, and products)
  - Review the basics of market segmenting, prospect targeting, messaging/positioning techniques, and pricing
  
- **Implementing techniques for researching your audience and measuring success.**
  - 40%
  - Enhance methods to distribute your “product” by building awareness and visibility of the organization through marketing and communications
  - Embrace member and market research as a key organizational driver
  - Assessing your outcomes/value and promoting return on investment to members
  
- **Utilizing marketing tools for nonprofits.**
  - 20%
  - Use technology in marketing communications (brief lead-in to C460 Integrating Strategic Technology Solutions) including social and traditional media
  - Gain an appreciation that successful marketing includes the whole organization (all staff and board) and supports the organization’s business plan as well as long-term plan

## Suggested class exercises:

- Case study of marketing strategies

## Additional learning opportunities:

- C460 Integrating Strategic Technology Solutions
- E360 Strategic 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 Objectives:

- **Creating events with a strategic purpose.**
  - 20%
  - Reevaluating and releasing your sacred cows
  - Does your program align with your overall mission?
  - What's a successful program or event?
  
- **Utilizing technology to improve the bottom line and increase attendee satisfaction.**
  - 40%
  - Pricing development based on total costs including staff and overhead
  - Technologies used throughout the event planning and implementation processes
  
- **Examining financial management, stakeholder management, and event design.**
  - 40%
  - Logistical operations and staff time
  - Program based budgeting
  - Contract management
  - Disaster preparedness

## Suggested class exercises:

- Breakouts

## Additional learning opportunities:

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

## Suggested resources:

- Meeting Professionals International
- Convention Industry Council and CMP standards

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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 Objectives:

- **Determining who should be involved in the program and why.**
  - 20%
  - Members
  - Government Relations committee board.
  - Key benefits
  
- **Creating a legislative policy.**
  - 40%
  - Potential issues to be addressed
  - 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 PACs and Political Endorsements

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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 Objectives:

- **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 Objectives:

- **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 Objectives:

- **Understanding processes for strategic planning.**
  - 30%
  - Develop a focused mission and vision statement
    - Critical elements and characteristics of a mission statement
    - 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.)
  - Developing or facilitating mission-focused strategic plans with staff, board members, and stake holders
  
- **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 Objectives:

- **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/ foundation relationships/ regional partnerships
  - Building alliances and coalitions within your own organization
    - 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
    - Understanding and using memorandums of understand (MOUs)
  - 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:

- C470 Advocacy and Alliances
- E340 501(C)(3) Foundations
- E350 The Art of Persuasion

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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 Objectives:

- **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)

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# C380 Volunteer Development

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## Course Description:

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

## Course Objectives:

- **Developing volunteer leadership.**
  - 30%
  - Ensure that volunteer leadership represent the diversity of the membership
    - Ex.: type of businesses, age, gender, ethnicity, geography
  - 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 through detailed job descriptions.
  
- **Implementing successful strategies to recruit organizational leadership.**
  - 30%
  - 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, including removal
  
- **Building a volunteer structure for future leaders to emerge.**
  - 40%
  - Establish a succession plan for volunteer leadership
  - Balance volunteer and staff roles and responsibilities.
  - Sound training and management
  - Trends impacting volunteerism today, including Department of Labor rules, board structure, etc.
  - Motivate

## Suggested class exercises:

- Case studies, including specifics of board, committee, and task force best practices
- Develop sample volunteer job descriptions for chambers and associations

## Additional learning opportunities:

- C180 Guide to Governance
- E180 Building Better Boards and Committees

## Suggested resource:

- ASAE's "The Decision to Volunteer"

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## C420 Current Legal Issues Facing Your Organization

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### Course Description:

Timely legal issues that can and will suddenly strike; and when to contact your attorney!

### Course Objectives:

- **Examining issues affecting your organization and the legal pitfalls.**
  - 34%
  - Social media
  - Data breaches
  - Identity theft
  - Intellectual property
  - Contracts
  
- **Understanding employment agreements at both executive and junior levels.**
  - 33%
  - Aspects of an effective employee agreement
  - Proper termination procedure
  - Potential liability of negligent referral when responding to inquiries regarding ex-employees
  
- **Exploring anti-trust laws and how they relate to not-for-profit organizations.**
  - 33%
  - Issues related to membership criteria and exclusion of potential members
  - Potential liability for boycotts and other anti-competitive concerted activity

### Additional learning opportunities:

- C220 Is That Legal
- E120 Executive Law

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# C430 Becoming a Strategic Leader

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## Course Description:

Strategic leaders foster collaborative teams that can position the organization toward success within the business community and external organizations.

## Course Objectives:

- **Building positive relationships with your team and external stakeholders and collaborators.**
  - 34%
  - Establishing trust
  - The importance of team building
  - Building successful teams including staff and volunteers to execute the strategic plan
  - Understanding the importance of work/life integration
  
- **Understanding the diversity of the business community and external organizations.**
  - 40%
  - Define “diverse”
    - Ethnic, generational, sexual, racial, religious, etc.
  - Create a climate of acceptance, understanding, and respect for diversity
  - Recognize different behavior and communications styles and adapt
  - Explore elements of building strong relationships with others
  
- **Measuring results.**
  - 33%
  - Developing meaningful measurement for accountability
  - Evaluating success
  - Providing feedback
  - Reporting results
  - Analyzing and understanding data to support the plan the organization needs

## Suggested class exercises:

- A team effectiveness assessment
- Case study
- Strengths Finder assessment

## Additional learning opportunities:

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

## Suggested resources:

- ASAE Operation Ratio Report
- ASAE and ACCE Diversity and Inclusion statements

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# C441 Industry Forecast

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## Course Description:

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

## Course Objectives:

- **Discovering essential industry trends.**
  - 33%
  - Identify what essential industry trends include given the organization's mission (e.g., chambers might look at a broad cross section of socio-economic and community trends, whereas an association might look at industry-specific trends). Trends may include:
    - Nature of belonging and gathering
    - Communications and technology
    - Scarcity and abundance
    - Global impacts
    - Population shifts
    - Political and social fragmentation
    - Resource alignment
    - Catalytic leadership
  - Identify sources for collecting data and recognizing trends
  - Discuss how to distinguish trends from short-term events
  
- **Understanding how the changing complexities of the global market affect your members.**
  - 33%
  - Discuss how trends are used in conducting an environmental scan for strategic planning
  - Review global trend data that organizations should observe to be informed
  - Discuss the importance of global markets on local economies
  - Demonstrate how to apply trend analysis and market research to strategic planning
  
- **Preparing to manage workforce trends and demographic shifts.**
  - 34%
  - Industry demographic changes
  - Population shifts
  - Attracting, managing, and retaining all generations

## Suggested class exercises:

- Case study: current laws and initiatives impacting local communities

## Additional Resources

- World Economic Forum
- Foresight Works- ASAE



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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 Objectives:

- **Creating a technology plan and budget.**
  - 50%
  - Understanding the technology tool set, integration (i.e., CMS, CRM, ERP and SM, etc.) and how it is needed to support association goals and activities
  - Staff issues with technology and cultural change
  - Weighing the costs, benefits, and return on investment of technology solutions
  
- **Developing technology strategies for your organization.**
  - 25%
  - Best practices
  
- **Protecting and maintaining your technology solutions.**
  - 25%
  - Identify areas in which new technology tools can improve design, development, and delivery of products and services
  - 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. Position your organization to be a leader in advocacy within the community and external organizations. Delve into the ins and outs of the different channels of coalition building.

### Course Objectives:

- **Developing political coalitions and alliances.**
  - 50%
  - Building coalitions
  - Finding issues in common
  
- **Preparing issue papers and other materials.**
  - 30%
  - Needs assessment
  - White paper spokesperson
  
- **Building and managing relationships with your elected officials.**
  - 20%
  - Anatomy of a legislative visit
  - How to conduct a proper meeting (prior, during, and after)
  - Communicating strategy
  - Conflict management
  - How to report back to your membership

### Suggested class exercises:

- Case study

### Additional learning opportunities:

- C270 Effective Government Affairs Programs
- E250 PACs and Political Endorsements
- C341 Win-Win Partnerships

### Suggested resources:

- Friends of the U.S. Chamber
- The Power of A

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# C490 Organization Leadership for the Future

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## Course Description:

Maximize your organization's potential by keeping current on trends and the environment around your organization. Create a synergistic environment through trust, appropriate culture, and the ability to affect change when needed.

## Course Objectives:

- **Utilizing situational awareness.**
  - 20%
  - Scanning the environment for change/trends (Resource: Sladek's book "Economy, Demographics, and Technology")
  - The decision to join (Resource: "10 Lessons for Cultivating Member Commitment: Critical Strategies for Fostering Value, Involvement, and Belonging")
  - Resource: ACCE's "Horizon Initiative: Chambers 2025" (<http://www.acce.org/main/horizon-initiative-chambers-2025/>)
  - Resource: "Environmental Scanning for Associations: The Everyday Guide to Capturing, Analyzing, and Interpreting Strategic Information"
  
- **Implementing techniques to lead change.**
  - 40%
  - Understanding your change style and 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 (staff and volunteer)
  - Managing upward (to the executive or to the board)
  
- **Developing a culture of leadership.**
  - 40%
  - Understanding the pros and cons of different organizational cultures
  - Promoting a culture that is sensitive and responsive to the needs, interests, and value of membership
  - Tools to sustain a leadership culture (staff and volunteer)

**Please Note:** The final 30 minutes of the class will be led by the Trustees Chair. During this time, the Chair will share opportunities for the graduates to stay engaged with Institute and further their professional development. The Chair will provide the graduates with take home CCE and CAE sample exams.

## Suggested class exercises:

- A case study of collaboration across communities
- A case study of how an organization changed its focus (i.e. advocacy, economic development)

## Additional learning opportunities:

- ACCE and ASAE Annual Conferences
- Take the CCE and CAE sample tests at home

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## 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 Objectives:

- **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

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## 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 Objectives:

- **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?
- C420 Current Legal Issues Facing Your Organization

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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 Objectives:

- **Defining unsatisfactory employee performance behaviors.**
  - 40%
  - Documentation techniques to track the unsatisfactory behavior
  - Tips for evaluating work performance
  
- **Learning tools and techniques to address problematic staff behavior.**
  - 30%
  - Tips for conducting regular and effective staff reviews
  - Preventative measures (e.g. New hire orientation, conveying expectations to your team, etc.)
  
- **Identifying actionable steps if you can't turn it around.**
  - 30%
  - Steps to help other team members affected cope with the stress
  - Steps to prepare for termination if necessary

## Suggested class exercises:

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

## Additional learning opportunities:

- C220 Is That Legal?
- E230 Managing Upward
- C125 Hiring, Firing, and Everything In Between

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# E140 Building Organizational Excellence

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## Course Description:

Excellent organizations begin with a determination to be the best. When your board asks, “Are we the best?” know how to answer their question.

## Course Objectives:

- **Identifying the principles and best practices of successful organizations.**
  - 25%
  - Characteristics of successful organizations
  - How are best practices determined? How do they evolve? Why are they important?
  
- **Benchmarking your organization’s performance against the standards of other top organizations.**
  - 50%
  - Suggested metrics
  - Conducting an organizational assessment
    - What is an assessment?
    - Why perform an assessment?
  - Internal involvement: staff, board, volunteers
  - External involvement: members, community, prospects
  - Outlining desired results
  - Performing a SWOT analysis
  - Organizational climate assessments/evaluations/measurements
    - Surveys, questionnaires, open forums, focus groups
  
- **Implementing best practices.**
  - 25%
  - Provide examples or case studies
  - Prioritize and focus
  - Communicate practices to internal and external stakeholders
  - Celebrate and acknowledge milestones and accomplishments achieved
  - Highlight accreditation, certifications, recognitions, and/or awards opportunities

## Suggested class exercises:

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

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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 Objectives:

- **Defining economic development, including the various types and forms.**
  - 50%
  - Definitions of and differences between community development and economic development
  - Explain different organizational structures for economic development groups. Public, private, etc.
  - Key trends among economic development organizations
  
- **Developing existing business retention and expansion programs.**
  - 25%
  - Identifying and qualifying prospects/developing marketing strategies with job creation as a top priority
  - Developing key performance indicators to assess your economic development marketing plan
  - Programs within economic development: retention and expansion, workforce development, entrepreneur training, leadership training
  
- **Building collaborative economic development relationships and receiving examples of funding structures for economic development organizations.**
  - 25%
  - Funding methods for economic development corporations: public, private, foundations, etc.
  - Importance of regional partnerships
  - Use of public and private funding for economic development

## Additional learning opportunities:

- E342 Advanced Strategies of Community and Economic Development



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# E161 Business Communication Technology Trends

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## Course Description:

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

## Course Objectives:

- **Understanding current trends in technology and social media.**
  - 33%
  - Cloud technology
  - Mobile responsiveness
  - Visual social media
  - How different generations use technology
  
- **Linking your organizational strategy to the use of technology and social media.**
  - 34%
  - Understanding analytics
  - Recognizing how your target audience utilizes your technology and social media
  - Knowing how to tie back your use of technology to achieving strategic organizational goals
  
- **Reaching your audience with the latest technology and social media tools.**
  - 33%
  - Social media outlets (e.g. Facebook, Twitter, Periscope, LinkedIn, Instagram, Blogs)
  - Social media tools (e.g. Canva, Hootsuite, Piktochart, etc.)
  - Website technologies

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# E163 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 Objectives:

- **Understanding the vehicles for sending your message.**
  - 35%
  - Determine best approach(es):
    - Editorials/op-ed
    - News release
    - Broadcast media, including PSA
    - Social media
    - Email campaign
    - Emerging media
  
- **Communicating your message with impact to different media outlets.**
  - 35%
  - Understanding different media audiences and tailoring your message to be relevant to them
  - Reinforce your message by being prepared and following up
  - Digital monitoring tools
  - Understand the role of ethics and transparency in your communications
  
- **Messaging with maximum preparation.**
  - 30%
  - Understand the purpose of your message and the self-interests of the intended audience
  - Plan for obstacles
  - Create an action plan and distribute to all essential employees
  - Create briefing kits/one-pagers on key issues provided to employees
  - Understand both sides of the issue
  - Fostering a relationship with the media as a content expert

## Suggested resources:

- Public Relations Society of America (PRSA)

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## E180 Building Better Boards and Committees

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### Course Description:

Learn to build strong boards and committees from recruiting the right people to successfully orienting board and committee members and planning for succession.

### Course Objectives:

- **Recruiting board members that reflect the diversity of your members.**
  - 20%
  - Understanding the make-up of your members
  - Tools for recruitment
  
- **Structuring a board or committee orientation program and setting expectations.**
  - 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 volunteers
  
- **Coaching the board or committee to think strategically and prepare for succession.**
  - 40%
  - Preparing young professionals to become leaders
  - Effective board retreats
  - Strategic planning techniques
  - Board engagement

### Suggested class exercises:

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

### Additional learning opportunities:

- C180 Guide to Governance
- C380 Volunteer Development

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# E210 Executive Finance

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## Course Description:

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

## Course Objectives:

- **Identifying and documenting unrelated business income tax.**
  - 20%
  - UBIT (unrelated business income tax)
  - Definitions
  - Examples
  - Excluded activities
  - Sponsorships vs. advertising
  - Documentation and strategies
  
- **Recognizing how audits have become more challenging and expensive in recent years and how to be better prepared to meet these new challenges.**
  - 20%
  - Finding an auditor
  - Audit committees
  - Audit reports
  - Opinion
  - Internal controls (SAS 115 Letter)
  - Required communications (SAS 114 Letter)
  
- **Implementing strong internal accounting controls and internal control building blocks.**
  - 40%
  - 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!
  
- **Exploring how to better communicate important financial information to your board and members.**
  - 20%
  - Financial dashboards and accompanying finance memos
  - Communication strategies for:
    - Board of Directors
    - Finance Committees
    - Annual Reports (to members and to the general public)

## Suggested class exercises:

- Internal accounting controls small group problem solving

## 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 Objectives:

- **Developing sponsorship pricing structures, factors, and packaging.**
  - 30%
  - Difference between sponsorship and advertisements
  - Finding a structure that's right for you
  - Key performance indicators of a successful sponsorship program
  
- **Identifying the right organizations to solicit sponsorship.**
  - 30%
  - Building partnerships to improve sponsor relations
  - Understanding the target audience of your event, publication, or program
  
- **Making the sponsorship sales pitch and showing the return on investment.**
  - 40%
  - Sponsorship menu
  - Evaluating the best time to make “the ask”
  - Determining the best person to make “the ask”
  - The plan for recognizing sponsors in a mutually beneficial fashion

## 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 Objectives:

- **Understanding your manager and building the relationship.**
  - 40%
  - Basic communication tips
  - Finding common ground
  - Seek to understand your manager's style
  - Positively adapting to the work style of another
  
- **Developing your value to your organization.**
  - 30%
  - Develop your personal brand
  - Manage up to stand out
  - Implement strategies to exceed expectations
  
- **Building trust with your manager.**
  - 30%
  - Avoid office politics
  - Learn the basics of trust building
  - Be trustworthy

### Suggested class exercises:

- Role playing

### Additional learning opportunities:

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

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## 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 Objectives:

- **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%
  - Shifts in:
    - Marketing
    - Meetings and events
    - Learning
    - Technology
  
- **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
  - Examples of innovative programs from associations

### Suggested class exercises:

- Brainstorming
- Case study of trailblazing associations
- Review bibliography of articles on Association Trends

### Additional learning opportunities:

- C441 Industry Forecast

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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 Objectives:

- **Understanding income, membership, and competitive marketplace trends in the chamber industry.**
  - 30%
  - Causes and implications of the above mentioned trends
  - Impact trends have on how you operate
  - Understand how relevance is related to income, membership, and competitive marketplace advantage
  
- **Identifying shifts in trends to ensure that your organization stays ahead of the curve and delivers member value.**
  - 20%
  - How do you know something is a trend?
  - Why is understanding and recognizing trends important?
  
- **Examining innovative programs, governance, and operating procedures of trailblazing chambers.**
  - 50%
  - 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 (sharing of best practices)
  - The benefits and risks of innovative programs

### Suggested class exercises:

- Brainstorming
- Case study of trailblazing chambers

### Additional learning opportunities:

- C441 Industry Forecast

### Suggested resources:

- ACCE's "Horizon Initiative: Chambers 2025" (<http://www.acce.org/main/horizon-initiative-chambers-2025/>)



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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 Objectives:

- **Understanding workforce development activities and terminology.**
  - 25%
  - Basic concepts
  - Recent legislative activity
  
- **Identifying common initiatives and roles of chambers in workforce development.**
  - 45%
  - Key trends
  - How your organization can make an impact
  - Partnering with local government and neighboring community initiatives
  
- **Exploring resources to assist you in your workforce development program.**
  - 30%
  - USCCF 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 Objectives:

- **Evaluating relationship management systems and information that should be captured.**
  - 33%
  - Key functions of a CRM System
  - Possible rubrics or criterion evaluation to help identify functions or data that are most important
  - Identify the types of data that are most important to be included in a CRM system
  - Discover tools that can be used to summarize information and help make recommendations
  - Additional management modules such as reports, communications, accounting, events, and sponsorship components that may be found in more robust systems
  - Process for data cleanup and integrity
  
- **Understanding how to link member data and forecast trends.**
  - 33%
  - Samples of reports to demonstrate their use in forecasting
  - Data uses in forecasting for planning marketing, budgeting, communicating, and engagement
  - Data mining and how it is used to generate new leads
  - Market segmentation and targeting audiences
  
- **Developing and analyzing data through surveys and other research tools.**
  - 34%
  - Methods for collecting data
  - Sample questions to receive desired data
  - Identify gaps in existing member data and develop a strategy to minimize those gaps
  - Explore primary and secondary sources of information to enhance existing member data
  - Evaluating your data collection process and the data received
  - Develop strategy for dissemination of insights throughout the organization and/or industry

### Additional learning opportunities:

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

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## E250 PACs and Political Endorsements

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### Course Description:

Is your organization ready to begin a PAC and engage in endorsements? This class will provide step-by-step instruction on how to establish and grow successful political action committees and endorse candidates.

### Course Objectives:

- **Addressing ballot initiatives and referendums.**
  - 33%
  - Who's involved?
  - What potential issues should be addressed?
  - What are the legal, financial, regulatory, and political implications?
  
- **Creating and maintaining a PAC.**
  - 34%
  - State and federal rules
  - Gaining the support of your board
  
- **Building an airtight endorsement strategy.**
  - 33%
  - Are they right for you?
  - Developing and maintaining written criteria for the endorsement process

### Additional learning opportunities:

- C270 Effective Government Affairs Programs
- C470 Advocacy and Alliances

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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 Objectives:

- **Evaluating advantages and risks of various dues schedules.**
  - 25%
  - Types of dues schedules
  - Types of dues structures
  
- **Identifying steps for conducting a review of your organization's dues structure.**
  - 50%
  - How often should you review the dues structure
  - Key players to involve
  - Best practices
  
- **Implementing techniques to ensure smooth implementation of a dues schedule change.**
  - 25%
  - How to market a new dues schedule to your board
  - How to market a new dues schedule to your members

### 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 Objectives:

- **Identifying what and what not to delegate.**
  - 25%
  - Steps of delegation
  - Work/life balance
  - Barriers to effective delegation
  - Frequent errors in delegation with impacts and remedies
  - Recognizing what others aside from you can do
  
- **Understanding how to delegate to the right person at the right time.**
  - 50%
  - Are they ready to listen?
  - Do they have the knowledge and skills needed?
  - Do they have the time?
  - Match the requirements of the job to the person
  - Create a timeline and a plan to follow-up when delegating
  - Understand the work style of those you delegate to
  
- **Implementing ways to 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 Objectives:

- **Sharing best practices.**
  - 40%
  - Capture and share advice and insights (“What I learned the hard way”)
  - Simple do’s and don’ts
  - How to handle the jump from staff to CEO
  
- **Exploring habits and behaviors of nonprofit executives, from challenges to everyday opportunities.**
  - 30%
  - Provide examples of how to change and implement habits/behaviors toward greater success
  - Capture and share good and bad virtues
  - How to handle the bad days
  - Moments of success – how to handle them
  
- **Assessing your career stage and growth opportunities.**
  - 30%
  - Dialogue on stages and phases of one’s career
  - Inventory arenas of personal growth
  - Skills for the future

### Suggested class exercises:

- Facilitated discussion of major oops and faux pas

### Additional learning opportunities:

- C490 Organization Leadership for the Future

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## E340 501(c)(3) Foundations

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### Course Description:

Whether you currently are paired with a Foundation or are thinking about adding a Foundation in the near future, you need to be fully cognizant of how to make this powerful arrangement work. Explore issues associated with IRS governance and compliance, as well as accounting and audit rules impacted by receiving restricted funds from contributions and grants.

### Course Objectives:

- **Making the most of your Foundation and leveraging the relationship.**
  - 30%
  - Why start a Foundation?
  - Revenue and support – contributions and grants
  - Typical activities
  - How to maximize the chamber/association and Foundation relationship
  - Lining-up staff, labor allocation and governance for a 501(C)(6) and 501(C)(3)
    - Awareness of your specific state legal trends
  - Support test rules
  
- **In-depth review of restricted funds and grants.**
  - 30%
  - Government grants vs non- government grants
  - Restricted vs. unrestricted funds
  - Temporarily restricted funds
  - Permanently restricted funds
  - Audit process and net asset releases
  - Financial statement presentation
  - Why unrestricted funds are so important
  
- **Understanding contributions, distributions and how to honor donors by correctly recording, managing, and recognizing donors for their gifts.**
  - 40%
  - Contributions, distributions vs. exchange transactions
  - Cash contributions
  - Non-cash contributions
  - In-kind contributions
  - Pass-through contributions
  - Documentation and donor intent

### Suggested class exercises:

- 20 contribution scenarios – small working group case study
- Contributions vs Distributions

### Additional Learning Opportunities

- C110 Financial Fitness
- E210 Executive Finance
- C310 Budgeting and the Bottom Line

**Note:** Please pay attention to the sensitivity of IRS and tax law

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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 Objectives:

- **Structuring a deal, identification, and use of incentives.**
  - 45%
  - Product identification
  - The key elements of “the deal”
  - Types of incentives, why they are needed, and when they are appropriate to be utilized
  - Clawbacks or other required benchmarks for performance
  
- **Understanding redevelopment, revitalization, and regionalism.**
  - 35%
  - The differences between redevelopment vs. new development
  - The redevelopment process
  - Blight and its negative impact on communities; identifying the need and creating the tools/resources to fix it
  - How do long range planning and city codes play into redevelopment?
  - The regionalism concept (provide examples of successful regions)
  - Dos and don'ts of successful regions
  
- **Utilizing technology in economic development.**
  - 20%
  - The use of social media in economic development
  - Databases and other resources for business (e.g. ERSI, real estate databases)
  - Technology platforms that support economic development

### 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 Objectives:

- **Understanding the types of decision makers and how they can be most effectively persuaded.**
  - 25%
  - How to identify decision makers
  - How to maintain relationships with decision makers
  
- **Identifying words and techniques to convince others to take action.**
  - 50%
  - Body language
  - Persuasive vocabulary
  - Best methods of communication
  
- **Implementing a plan of action for negotiations.**
  - 50%
  - Timeline for plan of action
  - Tips for following up on negotiations

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# E360 Strategic Communications

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*\*Previous to 2015, this course was titled Rethinking Communications*

## Course Description:

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

## Course Objectives:

- **Evaluating and structuring an effective communication strategy.**
  - 25%
  - The attributes that make up a communications strategy
  - Tools and/or methods for measuring effective communication (e.g. audience penetration, readership, and action against desired outcomes)
  
- **Targeting the right audience for various communications efforts.**
  - 25%
  - How to identify audience segments or targets based on desired communication outcomes
  - How audience-specific variations of the same message can be effective in communicating
  
- **Determining the appropriate brand within the market.**
  - 50%
  - Review of branding activities as a communication strategy
  - How to identify an organization's brand
  - Developing a brand and aligning messaging to support the brand
  - Different communication strategies to match branding objectives

## Additional learning opportunities:

- C150 Communicating with Confidence
- C260 Marketing Strategies
- E163 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 Objectives:

- **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 Objectives:

- **Identifying your value proposition.**
  - 50%
  - Students should 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 Strategic Communications
- C185 Recruit, Engage, and Retain Your Members