

IDS 390W: NOT-FOR-PROFIT ASSIGNMENTS

10-09/GNV

Assignment Parts (standard assignment)

Individual Briefing Report (1-2 pages)

Team Budgeting/Funding Proposal to Board

Team Presentations

Board Questions (team as “Board of Directors”) due day of presentation

Individual Briefing Report

Your role: Professional Staff Accountant

Audience: Manager in a Public Accounting firm who has been asked to serve on an Advisory Board of a not-for-profit organization.

Task: Select a *local* not-for-profit organization focusing on a societal concern (the arts, literacy, domestic violence, etc.) as your manager’s NFP. GET APPROVAL of your organization from Dr. Vik (must send link to Form 990). Prepare a 1-2 page briefing memo report to your manager describing what the agency does, why it is valuable to San Diego, what its Form 990 shows about its financial situation, what fundraisers it now holds. You may interview someone involved in the organization and use its home page, but you MUST check for external source articles to see if red flags exist. **Required:** Attachment listing all research sources in appropriate MLA or APA format. CITE SOURCES in text when borrowing through paraphrase OR quote.

Team Draft, Final Proposal, Presentation

Your Role: Members of a local not-for-profit organization

Audience: Board of Directors of a local corporation that you are asking for money.

Task: Each team selects one organization from the individual briefing memos by team members. Prepare a team presentation and accompanying documentation that requests funding and demonstrates the value of your cause/project, the benefits to the sponsoring organization, and your overall business expertise.

Scenario: Your organization is requesting funds from a corporation to help underwrite the costs of a fund raising or friend raising event that will raise awareness to combat a social problem (gangs, health concerns, aging, literacy, family violence, access to the arts, etc.) You need a donor to underwrite the basic costs of organizing and setting up the event. You need to convince the donor of the soundness and value of your proposal. Originality counts (DO NOT copy an existing event).

Required Proposal: Persuasive letter, Executive summary (two-page limit; third page is alpha list of sources in MLA or APA format), proposed budget, and assumptions used in preparing the budget. Added materials (invitation or flyer, program, ads, support letters) help show the planning and value of the event.

Presentation: Prepare a 10-12 minute persuasive presentation to the Board of Directors of the donor corporation including appropriate visual aids (show need, value to San Diego, event plan, budget, assumptions used to formulate the budgets, benefits to corporation).

Board Questions (Team as “Board of Directors”)

Your Role: Board of Directors of a corporation being solicited for money.

Audience: Members of a not-for-profit organization

Task: Using the second copy of another team’s report, prepare a list of questions that will help you decide whether to fund its request. Write a list of questions that follow a logical pattern showing why you are asking these specific questions. Pose these questions at the end of the presentation and turn in a typed copy of your questions. Put your team number AND the project team’s number and organization name on the list of questions.

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