

Notre Dame de Namur University  
EDU2212 -Financial Management  
Spring 2010 -Term II –Mondays

Barbara Caulley  
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Course Description:

Introduces financial management for non-profit organizations focusing on the key principles and terminology needed by managers. Emphasis on management, organization, financial accounting, budgeting, financial reports, and reporting cycles. Coursework includes case studies and a final project analyzing the fiscal status of a non-profit agency or organization.

Instructor Information:

Barbara Caulley received a B.S. in Accounting, and an MBA (with emphasis in Finance) from Notre Dame de Namur University (NDNU). She also received a JD from Golden Gate University School of Law in 2004. She is the Chair of the Professional Studies Program, and has taught non-profit and for-profit management, accounting & finance, and leadership for adults completing their degrees in Liberal Studies, Business, and Human Services. She has previously held various for-profit management positions in finance, accounting, and administration, including the CFO position at a \$250M subsidiary of Tyco (formerly Raychem). Additionally she has held numerous fundraising positions, including with great success, the capital campaigns for both Second Harvest and PalCare, as well as having served on various boards and committees for organizations on the Peninsula. Currently she is involved with the Teen Pregnancy Coalition of San Mateo County.

Texts: *Non Profit Kit for Dummies*, 3<sup>rd</sup> edition, Wiley Publishing 2010: ISBN # 978-0-470.52975-1  
And *Accounting for Dummies*, Hungry Minds, Inc. 2001: 0-7645-5314-3

Course Objectives:

Students should be able to understand:

1. basic financial and accounting concepts and terms appropriate to managers.
2. financial reports and what they say about the financial health of an organization
3. budgeting processes
4. the responsibilities of managers in financial reporting and analysis
5. the financial reports of a non-profit organization and determine its fiscal status
6. organizational and management of a non-profit

Attendance Policy

The nature of the Intensive Program requires a more stringent policy, and a student who misses more than one class or its equivalent must withdraw from the class. Learning Accommodations Students who have any documented situation which might affect their performance in this Class are encouraged to discuss it in advance with the instructor.

Grading: Attendance/Participation 35 points; Written Assignments 25; Presentations 20; Project 20. Written Assignments -These will be brief (3-4 pp) that will be due the first five classes. Grammar, spelling and organization DOES COUNT. Late papers will automatically lose 2 of the 5 possible points for each assignment. No report covers or cover sheets, please. Just name and date on top corner of pages. Additional assignments will be handed out in class each week. Assignment due for First Class – Read Chapters 1-3 Write Your Financial Autobiography After reading the assigned text chapters, discuss your financial history including:

1. Your current and past work situations -connection with financial issues.
2. Your comfort level with economics, accounting and finance? Prior classes, experience, numbers orientation, etc.

3. What you want to get out of this class that would be particularly useful in your personal or professional life? Assignments for classes 2 to 5 3-4 page analysis and critique of a newspaper or magazine article on a controversial financial topic including identification of issue, summary of argument, sources cited and your conclusions. Additional homework to be assigned in class for these chapters and subsequent chapters. Project report/Presentation – Students will select a non-profit organization for financial analysis and recommendations. This will include looking at 990 filings and organizational material. More information will be provided in the first class. **Due First Night: Read Chapters 1 and 2 in both texts**