During this past fiscal year, the major operational objectives of the Helen Bader Institute included the implementation of new educational, research, and capacity building programs, the continued development of program plans, and raising the visibility and profile of these programs and services. Since many of the Institute’s programs and projects are still in early start-up phases, it is not possible to report longer-range outcomes. Therefore, this section of the report will provide an update focused primarily on the operational progress of the Institute and its programs as they relate to the three university missions of education, research, and service.

A. Education (Credit and Non-credit)

1. Program Goal: To enhance training and learning opportunities in nonprofit management through graduate and undergraduate degrees, certificates, concentrations, and continuing education offerings.

Outcomes:

Short-term
- UWM is recognized as the leading university in the Greater Milwaukee area in the provision of both credit and non-credit nonprofit management and leadership education programs and course offerings.
- Major tenets of the Milwaukee Idea are realized through the provision of these educational programs in partnership with other universities and other, non-traditional providers of educational services.

Long-term
- Creation of a new pool of skilled leaders and managers for nonprofit sector organizations in the Greater Milwaukee area.
- Milwaukee nonprofits experience an increase in effectiveness and efficiency.
- Increased awareness and recognition by the Greater Milwaukee community of the role of the Helen Bader Institute for Nonprofit Management in enhancing nonprofit management and leadership.
- Community social ills begin to disappear and the quality of life improves because of increased nonprofit management and leadership effectiveness.

Graduate Educational Programs in Nonprofit Management

Graduate Certificate in Nonprofit Management

The new multi-disciplinary Graduate Certificate in Nonprofit Management program—originally planned to begin in the Fall semester of 2002—was approved early in 2003 and began in the summer of 2003. (See Appendix C for the list of graduate courses approved for this certificate program.) This new program is jointly offered by the College of Letters and Science and the School of Business Administration at UWM and is the first graduate-level program to be offered by any college or university in the State of Wisconsin that has been specifically designed for the leaders and managers of nonprofit organizations.

Each of the courses required for this graduate certificate program will be offered at least once per year to enable students to complete the program in one year should they wish to do so. Courses will be scheduled to meet one evening each week during the fall or spring semesters or during one of the two
summer terms to make them accessible to working professionals. The tentative schedule of courses for the academic year 2003-2004 is as follows:

<table>
<thead>
<tr>
<th>Course</th>
<th>Fall 2003</th>
<th>Spring 2004</th>
<th>Tentative Summer 2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concepts and Practice of Nonprofit Management</td>
<td></td>
<td>●</td>
<td></td>
</tr>
<tr>
<td>Theory and Practice of Nonprofit Management</td>
<td>●</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seminar in Nonprofit Organizations</td>
<td></td>
<td>●</td>
<td></td>
</tr>
<tr>
<td>Accounting for Nonprofit Organizations</td>
<td></td>
<td>●</td>
<td></td>
</tr>
<tr>
<td>Governance of Nonprofit Organizations</td>
<td></td>
<td></td>
<td>●</td>
</tr>
<tr>
<td>Fundraising and Development for Nonprofit Organizations</td>
<td>●</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Human Resources Management</td>
<td>●</td>
<td>●</td>
<td></td>
</tr>
<tr>
<td>Professionals and Volunteers in Nonprofit Organizations</td>
<td></td>
<td>●</td>
<td></td>
</tr>
<tr>
<td>Nonprofit Marketing Management</td>
<td></td>
<td>●</td>
<td></td>
</tr>
</tbody>
</table>

Since this program was approved, the Helen Bader Institute has mounted an aggressive internal and external marketing campaign to promote the program. Internally within UWM, students already enrolled in graduate programs in the several schools and colleges have been offered the opportunity to add the full certificate to their current degree programs, or to take one or more of the graduate courses that make up the certificate program as “electives” within their current degree programs. Externally, the certificate program has been marketed through such media as print, radio, and the Internet. In addition, HBI program staff members have hosted a number of “information sessions” open to prospective students and actively promoted the certificate program at local conferences, community forums, and nonprofit organizational meetings.

To date, student enrollments in two of the nonprofit management courses being offered in the fall of 2003 as part of the Graduate Certificate program, have exceeded expectations with 20 students enrolled in one course and 28 enrolled in the other. Thus far, 21 students have formally declared their intention to complete the Graduate Certificate in Nonprofit Management program. An additional 16 students are likely to declare their intention to do so during the 2003-2004 academic year. Should they do so, this would bring the total number of students in the Graduate Certificate in Nonprofit Management program in its first year of operations to 37—not counting any additional students who might apply and be admitted to the program in the Spring 2004 semester.

With generous support from the Institute’s major donors, the Helen Bader Institute has established scholarship funds to support its graduate education programs in nonprofit management and leadership. These funds have been created to increase the accessibility of these new educational programs for students who might otherwise not be able to afford their full costs and/or to encourage those with outstanding potential for successful careers in nonprofit sector organizations to enroll in these programs. To date, twelve partial tuition scholarships totaling $25,600 have been awarded to students enrolling in the Graduate Certificate in Nonprofit Management program in the academic year 2003-2004.

The Institute will continue to seek additional philanthropic gifts and grants and other financial resources to provide scholarship assistance to future students. Without such financial support, many existing and future nonprofit managers and leaders will not be able to realize their career goals or assist their nonprofit organizations to fulfill their missions.

**Proposed Masters Degree in Nonprofit Management and Leadership**

On November 21, 2002, the Leadership Council and the Deans’ Council of the Helen Bader Institute voted to seek approval for a new multi-disciplinary masters degree program in nonprofit
management and leadership. Since the process for obtaining approval for any new degree program is both complex and lengthy (requiring multiple approvals by UWM, the statewide University of Wisconsin system, and final approval by the state Board of Regents), the launch of this new program is not likely to occur before the fall of 2006.

The curricular content and structure of this new masters degree program has now been completed by a multi-disciplinary Faculty Working Group on Nonprofit Curriculum Development consisting of 25 faculty members (See Appendix D) drawn from six of the schools and colleges at UWM: the College of Letters and Science (and several of its departments and programs including the Master of Public Administration, Political Science, Sociology, and Urban Studies programs); the School of Business Administration; the Peck School of the Arts; the Helen Bader School of Social Welfare; the School of Education; and the School of Continuing Education. This faculty group has recommended a 39 credit-hour masters degree in nonprofit management and leadership. (See Appendix E for a list of the courses that are proposed for this masters degree program.) The recommendations of this faculty group will now be incorporated in a proposal for the new masters degree program and will begin the extensive review and approval process in fall 2003.

Non-credit Educational Programs

Non-credit Professional Certificate in Nonprofit Management

In October 2002, a new non-credit Professional Certificate in Nonprofit Management program was officially launched as a “joint venture” of the Helen Bader Institute for Nonprofit Management and the School of Continuing Education at UWM. Through the end of June 2003, 15 of the required 17 certificate workshops were held with a total enrollment of 241 students (an average of 14.6 students per workshop). Fifty-seven students have declared their intention to either complete the entire certificate program (17 workshops) or a “competency area” (four or five workshops) in strategic management, service provision, human resource development, or organizational change. To date, eleven of these competency area certificates have been awarded. Student evaluations of the quality of the content, instructors, and facilities used in the workshops attended have generally been quite high.

In the Summer of 2002, a five-member “Policy and Accreditation (P&A) Board” (See Appendix F) was established for the Professional Certificate in Nonprofit Management program to ensure that the content of the curriculum, the instructors, and the instructional techniques used in this program meet the standards for high quality continuing education. This P&A Board is also charged with reviewing and approving applications from other higher education institutions and non-university organizations wishing to participate in offering workshops as part of the certificate program. Requests for proposals from such organizations were mailed to approximately 35 organizations in October of 2002. To date, two such applications have been approved: a proposal from the College of Professional Studies at Marquette University and a joint proposal from the Nonprofit Center of Milwaukee and Alverno College. These organizations are scheduled to offer workshop modules as a part of the Professional Certificate for Nonprofit Management beginning in the fall of 2003.

In early November 2002, a Scholarship Selection Committee was formed to develop guidelines and procedures to award scholarships for the Professional Certificate in Nonprofit Management program with funds provided by the United Way of Greater Milwaukee. These scholarships may be awarded to employees of United Way member organizations. In late November 2002, program staff mailed scholarship application forms to more than 1500 people in the Greater Milwaukee area who had expressed interest in the Professional Certificate in Nonprofit Management program. To date, seven partial tuition scholarships have been awarded.

During its first year of operations, two new workshops were developed and offered as part of the Professional Certificate program at no additional cost to students. These workshops were entitled “Diversity in Action: An Historic Look At Nonprofit Organizations” and “The Language of Nonprofits”
and were based on feedback received in focus group interviews conducted in the Summer of 2002 with representatives of the African-American, Latino, Native American, and Asian American communities in the Greater Milwaukee area. Although these courses are not required as part of the certificate program, it is hoped they will encourage greater participation of nonprofit leaders and managers who represent communities of color. These two courses will be offered annually.

B. Research (Knowledge Management)

2. Program Goals: To generate and disseminate knowledge designed to foster a better understanding of new/emerging issues, models, policies, and practices involving nonprofit organizations, the nonprofit sector, nonprofit management and leadership, and philanthropy.

Outcomes:

Short-term
- Enhanced awareness of the status, needs, management trends, and challenges of nonprofit organizations in the Greater Milwaukee area.
- The visibility and accessibility of nonprofit management information and knowledge will lead to enhanced nonprofit organizational effectiveness in the Greater Milwaukee area.

Long-term
- Milwaukee becomes a prominent contributor to the growing body of knowledge regarding nonprofit organizations, the nonprofit sector, nonprofit management and leadership, and philanthropy.

Research Projects and Activities

The Helen Bader Institute for Nonprofit Management provides financial and other support for applied research projects and activities that are related to its mission, goals and objectives. In some cases, the Institute may opt to carry these out directly; in other cases, it may choose to “outsource” this research to other entities either inside or outside the University.

During the past year, HBI encouraged (and provided financial support to enable) University faculty and staff members associated with the Institute to become active members and participants in the research conferences and other activities of the two principal scholarly associations in the field: the Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA) and the International Society for Third Sector Research (ISTR). In November 2002, seven members of the UWM faculty and staff participated in ARNOVA’s annual research conference in Montreal. A similar size delegation will participate in the ARNOVA conference to be held in Denver in November 2003.

HBI also provided financial and other support to the Center for Urban Initiatives and Research (CUIR) at UWM to carry out applied research programs that seek to generate and disseminate knowledge on topics of interest and importance to nonprofit organizations, the nonprofit sector, nonprofit management and leadership, philanthropy, and related topics. During the past year, CUIR completed or initiated the following applied research projects on topics related to HBI's mission, goals, and objectives:

- **Inventory of Latino Organizations in Metro Milwaukee**: CUIR and the Roberto Hernandez Center at UWM conducted research to build an inventory of existing and emerging nonprofit organizations that are led/governed by Latinos and serve primarily Latino constituencies located in Milwaukee, Ozaukee, Washington, and Waukesha Counties. This research was funded by the Nonprofit Management Fund as part of the national Hispanics in Philanthropy Project.

- **Social Entrepreneurship Study**: CUIR, in collaboration with the Nonprofit Center of Milwaukee and the Urban Economic Development Association of Wisconsin, initiated a survey to learn more
about the extent of social entrepreneurship activities among nonprofit organizations in the Greater Milwaukee area and the interest these organizations may have in learning more about such ventures. This survey was mailed out in April 2003 and the report is scheduled for completion in the fall of 2003.

- **Studies of the Milwaukee Area Nonprofit Sector**: CUIR is in the early stages of designing a study of nonprofit arts and cultural organizations in the Greater Milwaukee area. This work follows on the research project commissioned by the Donor’s Forum of Wisconsin in the summer of 2002 that examines the economic impact of the nonprofit sector in Wisconsin. The purpose of the new study will be to explore and add depth to our understanding of the contributions made by the nonprofit arts and cultural sub-sector of the nonprofit sector to the economic and social fabric of the Greater Milwaukee area.

- **Research Support Activities**: This past fiscal year, CUIR worked on guidelines for the start-up and implementation of a university/community research mini-grant program. Plans to launch the program, support nonprofit sector research in progress, organize brown bag sessions for research reports, and evaluate the first year of progress are underway. CUIR also plans to establish a faculty mini-grant program on nonprofit research for faculty associated with HBI’s programs.

C. Service (Nonprofit Organizational Capacity Building)

3. **Program Goal**: To enhance the organizational effectiveness of nonprofit organizations in the Greater Milwaukee area.

**Outcomes**:

**Short-term**

- The more effective provision of management assistance services to nonprofit organizations in the Greater Milwaukee area.
- An increase in the pool of consultants of color providing management support services and the utilization of these consultants of color in the provision of such services.

**Long-term**

- Increased capacity of nonprofit organizations in the Greater Milwaukee area to pursue their missions effectively and efficiently.

**Capacity Building Projects and Activities**

The Helen Bader Institute for Nonprofit Management provides financial and other support for nonprofit organizational capacity building projects and activities that are related to its mission, goals and objectives. In some cases (as with its research projects), the Institute may opt to carry these out directly; in other cases, it may choose to “outsource” these capacity building projects and activities to other entities either inside or outside the University.

During the past year, HBI directly carried out the following nonprofit organizational capacity building projects and activities:

**The “Consultants of Color” Project**

The purpose of the “Consultants of Color” project is to explore means to enhance the utilization of consultants of color by nonprofit organizations in the Greater Milwaukee area. In November 2002, a “Consultants of Color Advisory Group” was formed by HBI to provide recommendations to HBI program staff with respect to the implementation of this project. During the summer of 2003, HBI conducted a series of focus groups to better understand the issues and challenges that consultants of color
face in providing these services. A report of the results of these focus groups will be issued in fall 2003. HBI staff are currently exploring the feasibility of establishing an online, consultants of color database as one means to enhance the utilization of consultants of color.

Social Entrepreneurship Projects:

- In the spring, and again in the fall of 2002, the Helen Bader Institute for Nonprofit Management joined three other organizations—the Nonprofit Center of Milwaukee, the Urban Economic Development Association, and the Center for Urban Initiatives and Research at UWM—in sponsoring a six-week series of “Social Entrepreneurship Roundtables” designed to increase the capacity of nonprofit organizations to design and implement “social entrepreneurship” activities.

- On October 2, 2002, J. Gregory Dees, author and founding faculty director of the Center for the Advancement of Social Entrepreneurship at Duke University was the keynote speaker at the first of four scheduled public symposia on social entrepreneurship. He spoke to more than one hundred Milwaukee-area nonprofit professionals at the Marcus Center for the Performing Arts.

- On October 3, 2002, Dr. Dees also spoke at a “Wingspread Conference” jointly planned and implemented by the Donors Forum of Wisconsin, the Helen Bader Foundation, and the Helen Bader Institute for Nonprofit Management. The purpose of this conference was to explore the feasibility and desirability of establishing in the Greater Milwaukee area a group of “social venture partners” (patterned on Social Venture Partners of Seattle and other such groups that now function in some 20 cities around the United States) who might be interested in pooling their financial resources to invest in “social ventures” by nonprofit organizations. Some thirty local nonprofit leaders and potential “partners” in such an entity attended this conference at the Wingspread Conference Center in Racine, Wisconsin and a steering committee was formed to continue exploration of this concept.

Evaluation of a Pilot Project on the Provision of “Coordinated” Technical Assistance

In June of 2003, Opportunities Industrialization Centers of Greater Milwaukee (OIC-GM) was awarded a grant by the Helen Bader Foundation to carry out a pilot project on the provision of “coordinated” technical assistance to nonprofit organizations. The Helen Bader Institute for Nonprofit Management has agreed to retain an independent consultant to conduct an evaluation of this pilot project. OIC-GM plans to initiate this pilot project in the fall of 2003. HBI's evaluation consultant will work with OIC-GM project staff to design the evaluation protocol and carry out the evaluation during the 2003-2004 fiscal year.

Nonprofit Management Excellence Awards

In December 2002, the Helen Bader Institute for Nonprofit Management assumed the fiscal and operational responsibility for the annual Greater Milwaukee Nonprofit Management Excellence Awards events. The purpose of this awards luncheon event is to recognize excellence in the management of nonprofit organizations in the Greater Milwaukee area. Proceeds of this event (net of expenses) will go to the general scholarship fund of the Helen Bader Institute for Nonprofit Management at UWM. This fund, is used to award scholarships to students wishing to enroll in the new educational programs now being offered at UWM that are specifically designed for people wishing to advance or pursue careers in nonprofit management and leadership.

The first of these annual events to be carried out under the auspices of the Helen Bader Institute (and its co-sponsor, the Nonprofit Center of Milwaukee) has been scheduled to take place on Friday, October 17, 2003 at the Italian Community Center.
Supporting Activities

During the past year, the Helen Bader Institute has provided staff and other support to a number of projects and activities being spearheaded by other Milwaukee area organizations to enhance the capacity of nonprofit organizations. These include:

- The Nonprofit Center of Milwaukee’s planning process to establish a “Finance Center” that will be a comprehensive, “one-stop” approach to providing an array of nonprofit accounting and financial management services.

- The consortium of nonprofit community development organizations, the City of Milwaukee, and the federal Department of Housing and Urban Development that is planning to form a Community Development “SWAT” Team, commonly referred to as McDIT (Milwaukee Community Development Intervention Team) to provide emergency management assistance services to nonprofit community development organizations who have been identified as at-risk for failing.

During the past year, HBI also provided financial and other support to the Center for Urban Initiatives and Research (CUIR) at UWM to carry out the following nonprofit organizational capacity building programs:

1. **ENTECH**

ENTECH (Empowering Nonprofits in Technology) conducts technology needs assessments and provides other technology support services to nonprofit organizations in the Greater Milwaukee area, and beyond. During the past year, ENTECH:

- Reached its 2002-2003 fiscal year goal of 23 technology assessments for nonprofit organizations in Southeastern Wisconsin (increasing its cumulative total of such assessments to 83). These assessments include recommendations (independent of those available from hardware and software vendors) with respect to how these nonprofit organizations may improve their management effectiveness through the appropriate use of modern telecommunications technology. A new report on these assessments entitled “The First 50 Assessments: The State of Technology in the Greater Milwaukee Nonprofit Sector” was released earlier this year. This report was accepted for presentation at the annual conference of the Association for Research on Nonprofit Organizations and Voluntary Action to be held in November 2003 in Denver, Colorado.

- Experienced a significant increase in the utilization of its website, [www.entech-online.org](http://www.entech-online.org). Beginning with 321 visitors per month in April of 2002, the website now attracts nearly 3,500 visitors per month.

- Received a $30,000 grant from the Faye McBeath Foundation to fund a new “Knowledge Guide to Nonprofit Technology” and other ENTECH program operations. The Guide will be a compendium of research findings, tools, and planning guides that focus on technology education for nonprofit managers. This Guide seeks to assist nonprofit sector organizations on a local, regional, and national level.

- Distributed its “Technology Policy Boilerplate” to a national network of nonprofit technology consultants. This “boilerplate” is designed to assist nonprofit managers and board members to develop policies for the use of technology in nonprofit workplace settings. The “boilerplate” has now been customized and downloaded from ENTECH’s website by more than 300 nonprofit organizations.
• Sponsored a “Nonprofit Technology Symposium” on February 13, 2003 with approximately 100 nonprofit professionals from the Greater Milwaukee area in attendance.

2. Nonprofit Milwaukee Portal

The Nonprofit Milwaukee Portal (accessible on-line at http://www.nonprofitmilwaukee.org) was initially developed by representatives of a group of Milwaukee area providers of management support services with the financial and other support of the Helen Bader Institute for Nonprofit Management. The purpose of the portal is to increase the availability and accessibility of information regarding events and other matters of interest to nonprofit organizations in the Greater Milwaukee area. The portal features a calendar of nonprofit activities in the Greater Milwaukee area. During the past year:

• The portal’s interactive calendar of nonprofit training and learning activities and events included more than 200 events sponsored by nearly 30 organizations. This calendar is under continuous refinement based on feedback from users of the portal.

• Approximately 50 links to topical information were researched and added to the portal.

• A “What’s New” feature was added to the portal’s home page in November 2002. This feature offers up-to-date information on training and learning opportunities as well as services and resources for nonprofit organizations.

• A special chapter on “social entrepreneurship” was developed and posted on the portal.

• A postcard announcing the portal and its website was mailed in November 2002 to approximately 1,600 staff members of Milwaukee area nonprofit organizations. Articles about the portal were placed in the newsletters and publications of 8 organizations, with a combined circulation of approximately 7,000.

• Visits to the portal increased by approximately 80 percent during the past fiscal year: from about 500 visits per month in July 2002 to nearly 900 per month by June 2003.

• Plans were made to upgrade the portal in the 2003-2004 fiscal year. This upgrade will increase the ability of the portal’s administrators and users to add topical content, including reports and publications. A new monthly electronic newsletter will provide news and updates to bring visitors back to the portal on a regular basis.

Diversity and Cultural Competence

4. Goal: To strengthen diversity and cultural competence within the nonprofit sector

Outcomes:

• Nonprofit organizations will increase their capacity and level of effort to reach populations frequently underserved due to racial, ethnic, or cultural background; income, educational levels, or geographic area.

• Programs of the Helen Bader Institute will be culturally competent.

• The Leadership Council and other key stakeholder groups associated with the Helen Bader Institute will be diverse in race, gender, and ethnicity.

In the summer of 2002, the Helen Bader Institute conducted a series of “respectful dialogue” focus group sessions with representatives of four communities of color in the Greater Milwaukee area: the African American, Latino, Hmong, and Native American communities. These focus groups, facilitated by diversity consultant Gladis Benavides, were designed to enable the Institute to assess its inclusiveness and
gain important cultural perspectives with respect to its governance, policies, and programming. The results of these focus group sessions were included in a report presented at the April 2003 meeting of the HBI Leadership Council. The Leadership Council has assembled a Diversity Taskforce to study the report’s findings and provide policy recommendations for future implementation.