

PAD 4936-03/5935-07; SPRING 2007
FUNDRAISING AND FUND DEVELOPMENT

Wednesdays, 5:15 – 8:00 pm
Bellamy 111

Instructor:

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Office Hours:

By appointment on Wednesdays between 4:00 – 5:00pm

Required Texts and Readings:

The following text is required:

Conducting a Successful Fundraising Program: A Comprehensive Guide and Resource
Kent E. Dove (2001), Jossey-Bass. ISBN: 0787953520

Other readings will be web based and URLs are provided in the course outline. Additional suggested readings may be introduced during the course.

Web resources:

Fundraising Library courtesy of Tony Poderis at <http://www.raise-funds.com>

This resource, along with the examples in the second half of the text, will be particularly useful for the students taking the service learning track. These are quick reading, to-the-point brief articles and samples of fundraising documents and tools.

Sample exhibits and documents: <http://www.raise-funds.com/exhibitlist.html>

Short papers on fundraising topics and issues: <http://www.raise-funds.com/library.html>

Avoiding jargon courtesy of the Edna McConnell Clark Foundation:

<http://www.emcf.org/pub/jargon/index.htm>

Career issues and advice in fundraising:

<http://chronicle.com/jobs/archive/advice/fundraiser.htm>

Course Purpose:

This course has been designed for the MPA specialization in Civic and Nonprofit Leadership. It is a survey course that examines the role of fundraising and fund development in nonprofit organizations, and the various fundraising techniques used by these organizations to further their mission. One of the

practical goals of the class is to give students who plan to work in a nonprofit environment a general, but effective working knowledge of fundraising tools and techniques. There will be, for those who take the Service Learning Option, an opportunity to get hands-on nonprofit organization experiences and use their lessons learned in these experiences to reflect on both the experience and the subject matter of the class.

Learning Objectives:

1. **Knowledge Objectives.** Students will gain an understanding of: a) the role of philanthropy in the nonprofit environment; b) developing and integrating fundraising strategies into the organization's mission; c) practical, ethical and legal considerations of the fundraising enterprise; d) the various types of fundraising techniques used by nonprofits to achieve their financial goals.
2. **Skills and Abilities.** Through engaging in service learning and other class activities, students will develop the following: a) skills of perception for understanding the dynamics of fundraising in the nonprofit environment; b) research and evaluation skills c) reflective skills in which they can relate lessons learned in service activities to those of other students and to course reading and discussion materials; d) writing and verbal communication skills; and, e) practical strategies for planning, developing and implementing fundraising activities in nonprofit organizations.
3. **Values and Attitudes.** Students will gain an appreciation for and attempt to integrate the following values, attitudes, and traits: a) the role of philanthropy society in general and the nonprofit environment; b) responsibility as the steward of other people's generosity; c) teamwork and collaboration in the fundraising enterprise; and, d) ethical behavior, to be promoted in the student's own conduct and encouraged in the conduct of others with whom the student interacts.

Evaluation:

Students will choose between two tracks: A. Research Project Track; or, B. Service-Learning Track

While there is considerable overlap in these two options, the "Service Learning" track involves hands-on experience in a local nonprofit organization, whereas these activities are replaced by a semester research paper in the "Research Project" Track.

Track A: Research Project Track

A. Two graded in-class essay exams: midterm and final, graded from 0-200. 400 points total.
See "Course Outline and Readings" (below).

B **"Research Project" assignment:** You choose topic (subject to instructor approval) for research and final presentation in written form; 400 points possible. The project does not necessarily have to be a research-oriented term paper. For example, it can be a fundraising plan, a position/policy paper, or an evaluation of a fundraising technique, program or event. We will discuss this further in class.

C. **Quizzes:** I will offer 11 unannounced "pop" quizzes during the first 5 minutes of each class. You may have your notes open (from reading), but not the readings themselves. I will take your ten best grades

on these quizzes. Grading as follows: 0 – unexcused absence during quiz; 5 – poor answer; 10 – acceptable answer: 100 points possible.

D. Fundraising assignment: Two part assignment (topic TBA) designed to assess learning of course content. Part I (50 points max); Part 2 (50 points max). Part 2 must be submitted electronically. 100 total points possible.

Track B: Service-Learning:

A. Two graded in-class essay exams: midterm and final, graded from 0-200. 400 points total. See “Course Outline and Readings” (below).

B Service-learning assignment. Thirty five hours of service learning in a Tallahassee-area nonprofit organization. You must perform at least three hours in each of 10 weeks, but the total of hours must be at least 35. Service will be documented on the FSU “Servscript” form. You will receive all points for this item if you accomplish the following: A. You must have your hours completed and the Servscript submitted to the Center for Civic Education by the semester deadline (about 10 days before end of semester); if you fail to meet the deadline or the number of hours, you will submit your record to me for partial credit; B. Maintain a “journal” of your activities, subject to my examining it in class; C. a final summary and self-evaluation of your learning experience due the last day of regular classes. 400 points.

C. Quizzes: I will offer 11 unannounced “pop” quizzes during the first 5 minutes of each class. You may have your notes open (from reading), but not the readings themselves. I will take your ten best grades on these quizzes. Grading as follows: 0 – unexcused absence during quiz; 5 – poor answer; 10 – acceptable answer: 100 points possible.

D. Fundraising assignment: Two part assignment (topic TBA) designed to assess learning of course content. Part I (50 points max); Part 2 (50 points max). Part 2 must be submitted electronically. 100 total points possible.

Grading:

Letter grades will be assigned according to the following point totals: A = 925 or more; A- =900-924; B+ = 875-899; B = 825-874; B- =800-824; C+ = 775-799; C=725-774; C- = 700-724; D+ = 675-699; D = 625-674; D- = 600-624; F = less than 599.

Incomplete Grades: I will extend a grade of incomplete (“I”) if unforeseeable circumstances keep you from completing the course requirements within the normal semester. Under these circumstances you submit the missing assignments during the subsequent semester but not revisions of previously graded work. The “I” is inappropriate for the purpose of avoiding a failing grade if you conclude that your accumulation of points is insufficient to pass the course. The appropriate course of action under those circumstances is to drop the course or withdraw from the University.

Missed exams/quizzes: You are allowed one unexcused absence from quizzes as I will only be using the 10 best quiz scores. If due to unforeseen circumstances, you need to be absent from a scheduled class or exam, please notify the instructor IN ADVANCE to make alternate arrangements. Notification of absence due to unforeseen circumstances after the fact will be dealt with in accord with University and Department policy.

Late Assignments: Research project and web assignments will be accepted up to and ONLY one class date late since they are due near the end of the semester. Unless arrangements have been made IN ADVANCE, all assignments that are submitted from one day late through the date of the next class will lose one letter grade. No assignments will be accepted after the time of the final exam.

Class attendance is not mandatory but strongly recommended for the following reasons. First, course materials that you will need to know for exams and homework will be presented in classes. Second, quizzes missed due to unexcused absences cannot be made up – a grade of 0 will be assigned for that quiz. Third, I will consider regular attendance, active effort to engage in class activities, and participation on the web conference site in cases where a grade is “on the bubble” between two letter grades. I do pass around attendance signup sheets for each class.

Academic Honesty: You are expected to understand and uphold the Academic Honor Code published in the Florida State University Bulletin and the Student Handbook. In addition to information listed in these sources, you are advised that:

1. If you take material that is not yours, from any source whatsoever, and copy it into assignments for this class, you must provide a footnote, endnote, or parenthetical reference to the source of the material. I specifically expect you to use the style guide of the American Psychological Association, for which guidelines are available in Strozier library and at:

http://www.fsu.edu/~library/guides/apa_style.html

2. Any material which quotes verbatim from other sources must be enclosed in quotation marks and its source attributed as noted in rule #1 above, and a specific reference to the pages in the original where the material is found must be provided.

3. Material not taken verbatim from a text but paraphrased must also be attributed as in Rule #1.

4. Violations of these rules in any assignment may be subject to a minimum penalty of a grade of zero (0) for the assignment and may result in a grade of “F” for the course.

*** The instructor will clarify any of these expectations that you do not understand ***

Accommodations for Students with Disabilities: Students with disabilities needing academic accommodation should: 1) register with and provide documentation to the Student Disability Resource Center; and, 2) bring a letter to the instructor indicating the need for accommodation and what type. This should be done during the first week of class.

COURSE OUTLINE AND READINGS: (tentative: to be updated)

CH: chapters in text

RG: “resource guide” materials in second half of text (skim read unless noted otherwise)

POD refers to web resources on Tony Poderis’ site

REVIEW means just that, do not have to read in detail

Jan 10: Week 1: Course overview

- Course Intro and Overview
- History of Philanthropy
- Modern Philanthropy
- **READINGS: Intro, CH. 1: POD** <http://www.raise-funds.com/121603forum.html>

Jan 17: Week 2: Laying the Foundation for Fund Development & Defining an Integrated Development Program

- Discussion of Service Learning Option
Guest: Dr. Marcia Turner, Director, Service Learning, Center for Civic Education & Service
- Your organization's role in the community; it's mission
- Institutional needs and goals
- Defining your constituencies
- planning, marketing, communications: press, media, development writing
- definition of annual giving, capital giving, planned giving
- types of revenue: gifts, memberships, program fees, investment income
- gift processing and reporting
- ethics
- **READINGS: CH 2, pp 32-41; RG 1-3**

Jan 24: Week 3: Making the Case

Guest Speaker: TBA

- Educating your constituencies
- Case statements and other development materials
- Making the "ask"
- **FUNDRAISING ASSIGNMENT PT. 1 ASSIGNED: DUE FEB 21**
- **READINGS: CH 3 RG 4-6: Review** <http://www.emcf.org/pub/jargon/index.htm>

Jan 31: Week 4: Volunteers and Staff: Roles, Responsibilities and Relationships

Guest speaker: Mary Lazor, Chief Financial Officer, Live the Life Ministries

- Working in a nonprofit environment; not your normal 9-5; travel, weekends
- Fundraising staff
- Support staff; managing the development operations
- Board members
- Volunteers; "gifts" of services
- Consultants and other specialists
- Continuing education for the fundraising professional
- Nonprofit finance: tax considerations: institutional policy, trustee vs. fiduciary, compliance
- **READINGS: CH 4, 6 (pp 84-93), 18; RG 8-10, 20, 30 Review:** <http://www.raise-funds.com/698forum.html>; **Review** <http://chronicle.com/jobs/archive/advice/fundraiser.htm>

Feb 7: Week 5: Annual Giving and Fundraising Methods

Guest speaker: Mary Dekle, Resource Developer, Legal Services of North Florida

- Types of gifts: cash, securities, real and tangible property; services
- Role of annual giving: demonstrating a base of support, donor retention, major gift prospect identification
- memberships
- annual giving, development planning

- Telephone, direct mail, internet and other methods
- Federated campaigns: United Way, govt.; etc.
- **READINGS: CH 9; RG 9, 11, 13-15, 26**

Feb 14: Week 6: Special Events fundraising

Guest speaker: *Danielle Foster*

- Objectives: Fundraising vs. “friend” raising
- Publicity
- Sponsorships and underwriting
- Types of special events that fit your organization
- **READINGS: CH 9 (pp. 153-158); RG 17, 25, 28**

POD <http://www.raise-funds.com/799forum.html>

Feb 21: Week 7: Managing Information About Prospects & Donors ; Stewardship

Guest speaker: *Valerie Rosplock, FSU Foundation*

- Institutional memory: record keeping, gift policies, and paperwork
- Identifying, Involving and Retaining Current and Prospective Donors
- Management tools and systems
- Prospect research and confidentiality issues
- Public relations: recognition, acknowledgements and receipts, giving clubs
- Donor retention and promotion
- **FUNDRAISING ASSIGNMENT PT. 1 DUE**
- **READINGS: CH 10, 19, 20; RG 16, 30, 31**

- **Feb 28: Week 8:**
- **MIDTERM EXAM**

Mar 7: SPRING BREAK

Mar 14: Week 9: Capital Gifts

Guest Speaker: *Diane Jefferson, Director of Development, Mission San Luis*

- Capital gifts
 - Special and major gifts
 - Using board members and volunteers in the ask
- **READINGS: CH 11, 14; RG 19**

Mar 21: Week 10: Corporate and Foundation Gifts

Guest speaker: *Alfredo Cruz, former Program Officer, John S. & James L. Knight Foundation*

- soliciting organizations, seeking grant support
- Corporations and foundations: why they give
- Fundraising vs. grantsmanship
- Grant writing and budgets

READINGS: CH 15

Mar 28: Week 11: Specialized fundraising programs and needs

Guest Speaker: TBA

- Gifts-in-kind from products to artworks

- Appraisal and taxation issues
- real estate
- Special programs: cars, boats, memorials/honors, other specific items
- Cause-related marketing
- **READINGS: POD** <http://www.raise-funds.com/1001forum.html>; <http://www.raise-funds.com/010902forum.html>;

April 4: Week 12: Grant Writing

Guest Speaker: TBA

- Types of funders
- Matching funder's goals and nonprofit mission
- Do's & Don't
- Proposals
- Evaluation & Assessment
- Budgets
- Relationships
- **READINGS:** To be provided

Apr 11: Week 13: Planned Giving

Guest Speaker: Tom Norman, JD, CFRE, Florida Dental Health Foundation

- Basic programs: liability and other financial issues; wills, bequests, trusts and insurance
- Real estate and tangible property: life estates, bargain sales, gifts-in-kind
- Regulated devices: pooled income funds; annuities
- Exam Review
- **FUNDRAISING ASSIGNMENT PT. 2 DUE**
- **READINGS: CH 12, 13; RG 21; POD** <http://www.raise-funds.com/599forum.html>

Apr 18: Week 14: Program Assessment

- Growing your Program
- Program Assessment
- Other Issues
- Exam Review
- **TRACK A: FINAL PROJECTS DUE**
- **TRACK B: SUMMARY/EVALUATION DUE**

Apr 25: Week 15: EXAM WEEK

- **FINAL EXAM 5:30 – 7:30pm**