

NPAD 512: Fundraising

Summer 2021

Instructor: Dr. Anna-Margaret Goldman

Office: Brantley 001

Email: anna-margaret.goldman@mso.umt.edu

Phone: 406-243-2219

Office Hours: Tuesday, Wednesday, and Thursday 4:30-5:30pm and by appointment. Sign up for office hours at <https://appoint.ly/s/drgoldman/officehours> and meetings will be held at <https://umontana.zoom.us/my/annamargaretgoldman> unless arranged by phone or in-person

Course Description and Objectives

This is a ten-week, undergraduate/graduate-level course intended for students and professionals interested in learning the basics of fundraising (development). We will explore the foundational theories and practices of development, as well as the major aspects of a fundraising plan: major gifts, capital campaigns, annual funds, planned giving, grants, and special events. This course will give students tools and strategies for effective fundraising.

By the end of the course, students will have developed a unique nonprofit fundraising plan. This course intends on meeting four main objectives:

- Understand and properly use fundraising terms.
- Analyze and evaluate the fundraising strategy adopted by one nonprofit organization, and suggest improvements to the organization.
- Write a fundraising plan for a nonprofit organization.
- Show ability to implement the AFP Codes of Professional Conduct.

Required Course Readings & Materials

- Sargeant, A., Shang, J., & Associates (2010). Fundraising Principles and Practice. San Francisco: Jossey-Bass. ISBN: 978-0-470-45039-0 **1st Edition**
- Weekly lectures and updates from course instructor on Moodle (UM learning management system)
- Readings and videos on Moodle
- Discussions with classmates on Moodle

Assignments and Grading Discussion Board Posts & Responses (20 points every other week)

The only way to really learn from the class is to fully engage with your peers. The discussion board serves as our classroom. It is where we can engage and share ideas and insights. Please take the time to clearly articulate your posts, using correct grammar and spelling. For full credit, make sure to utilize the readings and materials for the week. Ideally, responses to the discussion questions are around 100-200 words (for reference, one page in 12 pt font and double-spaced is about 250 words) and include ideas and references from the week's readings.

Each week you respond to a reading. You will also read your classmates' posts and comment on them. You must reply to the initial discussion question by **Wednesday night**. Each student must include at least **(2) substantive reply** (around 50 words) to a peer's comment. Make sure to utilize readings in these

posts as well. It is expected that each student will help foster a collegial learning environment by sharing their experiential and academic knowledge and practices, as well as respectfully listening to the viewpoints of others. Treat these interactions as you would an in-class, face-to-face conversation.

Fundraising Plan This is a five-part project that culminates with the final fundraising plan.

Part 1: Introduction (10 points): Time period addressed in the plan, author (your name), name, mission, and brief description of the organization, and why you selected the organization (10 points)

Proper Format (size 12 font, 1 inch margins, legible font, organized, headers if needed)	2 points
Content: Time period, Author, Name Mission, Description, and Why of Org	5 points
Well organized prose, grammatically correct, proper use of citations	3 points

Part 2: SWOT analysis (50 points): Utilizing course readings and the lecture, identify strengths, weaknesses, opportunities, and threats (SWOT) for fundraising for your organization (50 points).

Proper Format (size 12 font, 1 inch margins, legible font, organized, headers if needed)	10 points
Content: introduction, SWOT, conclusion	30 points
Well organized prose, grammatically correct, proper use of citations	20 points

Part 3: Fundraising Goals and Calendar (50 points): Use the excel sheet template in Week 4 to create your Fundraising Goals and Calendar.

Goals- SMART goals that are clear, organized, and make sense to a reader outside the organization	25 points
Calendar- clearly organized calendar with dates for fundraising and events	25 points

Part 4: Fundraising Analysis (50 points): Understanding what's effective in a fundraiser is an important component and takeaway from the class. For this assignment, you should pick a fundraiser from your chosen organization to analyze in 3-5 pages double spaced. Include a revised Part 1,2, and 3 in addition to Part 4. Your analysis should include:

- Introduction: Introduce the event/fundraiser you will be analyzing, why you selected this fundraiser, and a brief history and goals of the fundraiser (15 points)
- Examination: What did you learn about the organization from the fundraiser? What were the pros and cons of the fundraiser? Did they meet their intended goals? Why or why not? How does this compare to their past fundraisers if this is a reoccurring event? Make sure to use readings from the semester in your analysis. (20 points)

- Conclusion: What suggestions or changes would you make to the fundraiser? What would you emulate if you were doing a similar event? Use references to the readings to support your recommendations (15 points)

Part 5: Final Fundraising Plan (100 points):

For Final Project:

- Executive Summary: one-page summary of the main proposals in the fundraising plan, must use in-text citations to reference course readings (25 points)
- Table of Contents: detail of key sections and sub-sections (5 points)
- Other revised components from the class including your Cover Page, SWOT, Fundraising Goals and Calendar, and Fundraiser Analysis. You may also choose to include a budget modeled in Week 5 (15 points)
- Key Fundraising Strategies (overall direction, positioning, case for support) (25 points)
- Tactical plans (individual giving, major gifts, corporate giving, and trust/foundation) helpful link in identifying donors (25 points)
- Conclusion- a paragraph wrapping up the assignment, including next steps for the organization (5 points)

Total Points for the Class

Discussion board posts & replies	5 x 20 points = 100 points
Part 1: Introduction	10 points
Part 2: SWOT analysis	50 points
Part 3: Fundraising Goals and Calendar	50 points
Part 4: Fundraiser Analysis	50 points
Final Fundraising Plan	100 points
Total	360 points

Grading Scale

The University of Montana uses the Plus/minus grading system and a Credit/No Credit system (the CR/NCR replaces the Pass/Fail system used in the past). General education courses must be taken using the traditional letter grade to count toward one's general education requirements. To accommodate the Plus/Minus system the grading scale shown below will be used.

Grade Point Scale

A 93-100 A- 90-92

B+ 87-89 B 83-86 B- 80-82

C+ 77-79 C 73-76 C- 70-72

D+ 67-69 D 63-66 D- 60-62

F 59 or lower

Please Note:

I try to make this syllabus as complete and correct as possible. I do reserve the right to make any necessary changes. If that happens, I will let you know via Monday Update/email.

Course Expectations

Participation

Students are expected to fully engage and participate in this course. While the course is online, and is asynchronous, students should be prepared to check Moodle daily, read email, and post in the discussion board by replying to each discussion and commenting to another two students (with meaningful replies). You must post an initial answer by Wed. of each week and a reply on each question by the next Monday.

Holiday

During this course, we encounter several holidays. With online learning, we do not take “time off” for those holidays. It is your responsibility to know the due dates, and to get your work done for that week.

Cultural or ceremonial leave allows excused absences for cultural, religious, and ceremonial purposes to meet the student’s customs and traditions or to participate in related activities. To receive an authorized absence for a cultural, religious or ceremonial event the student or their advisor (proxy) must submit a formal written request to the instructor. This must include a brief description (with inclusive dates) of the cultural event or ceremony and the importance of the student’s attendance or participation. Authorization for the absence is subject to approval by the instructor. Appeals may be made to the Chair, Dean or Provost. The excused absence or leave may not exceed five academic calendar days (not including weekends or holidays). Students remain responsible for completion or make-up of assignments as defined in the syllabus, at the discretion of the instructor.

Submitting Assignments

Be sure to format your paper with name, course, and date in [APA format](#). All assignments should be submitted through the learning unit tab. Assignments will not be accepted via email. Assignments are due by 11:59 pm (Montana time) on the specified due date. **PLEASE NOTE:** Late assignments will be accepted at the discretion of Dr. Goldman. Points will be deducted for late assignments.

References

You will be required to use appropriate peer-reviewed references in your work. Please use APA Style Manual when referencing work.

Course time and preparation

Students can expect to spend approximately 6-8 hours per week on this course.

Using Moodle:

Since this is an online course, each student should check our course site once per day. Here is the link for [Moodle access](#). Call UM Online by phone, (406) 243-4999 or email umonline-help@umontana.edu if technological problems arise.

University Notes/Policies:

Writing Center

The University of Montana Writing Center is a great resource to review written assignments and readily available

to best meet the needs for online and in-person students. Please set up an appointment in advance for staff to review your work before assignments using this [link](#).

Request for Withdrawal

Please see the [Office of the Registrar](#) for information on withdrawing from courses and on refund policies. Students are responsible for reading and understanding the full UM policy on Withdrawal from the University. (Please note- I do ask that you just contact me to let me know you are thinking of withdrawing.)

Student with Disabilities

The University of Montana assures equal access to instruction through collaboration between students with disabilities, instructors, and Disability Services for Students. If you have a disability that adversely affects your academic performance, and you have not already registered with Disability Services, please contact Disability Services in Lommasson Center 154 or 406.243.2243. I will work with you and Disability Services to provide an appropriate modification.

Land Statement

The Salish Cultural Council created the language, "*The University of Montana acknowledges that we are in the aboriginal territories of the Salish and Kalispel people. Today, we honor the path they have always shown us in caring for this place for the generations to come.*"

Student Conduct Code

The Student Conduct Code, embodying the ideals of academic honesty, integrity, human rights, and responsible citizenship, governs all student conduct at The University of Montana-Missoula. You are expected to adhere to this [code](#).

It is also expected that each student will help foster a collegial learning environment by sharing his or her experiential and academic knowledge and practices, as well as respectfully listening to the viewpoints of others and following basic [netiquette](#) rules. You are expected to complete all reading assignments so that you can discuss them intelligently in discussion forums, individual assignments, and small group (collaborative) assignments.

Plagiarism

Acts of cheating or plagiarism will result in a grade of zero (0) for the assignment. Moreover, acts of plagiarism will also be reported to the Academic Court. To avoid acts of plagiarism, cite each reference or source you use and give proper credit for the ideas, opinions, and findings of others. When you are using the exact words of others, you must use quotation marks and include the page number where you found the quote in your citation.

Course Schedule

Week	Topic	Watch/Listen/Read	Submission
Week 1 May 10 th -May 16 th	Course Overview Introduction to nonprofits & the fundraising profession	Read: 1. Chapters 1 & 2 (Sargeant & Shang) 2. Suggested skim: 2019 Nonprofit Employment Report Watch & Listen: 1. Zoom syllabus review 2. Week 1 lecture	Discussion Board: Introduce yourself and get to know your peers. Initial post due 5/13. by 6 p.m. MST Reply to peers due 5/16. LIVE syllabus review and zoom session with fellow students Wednesday, May 12th at 5:30pm *session will be recorded for those who can't attend live
Week 2 May 17 th -23rd	Understanding individual donor behavior/motivations	Read: 1. Chapters 4 & 5 (Sargeant & Shang) 2. 7 Faces of Philanthropy article 3. Suggested skim Resources on Federal Tax law Watch & Listen TEDx talk: How to motivate people to do good for others	Assignment: Part 1: Introduction due Due on 5/23 by midnight MST.
Week 3 May 24 th -30th	Fundraising Audit	Read: 1. Chapters 6 & 8 (Sargeant & Shang) 2. Fundraising Audit Questionnaire 3. Nonprofit Audit Guide Watch & Listen: Week 3 lecture	Discussion Board: See full guidelines in Moodle. Initial post due 5/26. MST Reply to peers due 5/30.
Week 4 May 31st-June 6th	Fundraising Plan	Read: 1. Chapter 7 & part of Chapter 9, stopping at page 214 before Benchmarking section	Assignment: Part 2 SWOT analysis Due on 6/6 by midnight MST

		begins (Sargeant & Shang) 2. 5 Strategic Fundraising Calendar Tips (online) 3. Fundraising Goals + Planning Calendar Templates Watch & Listen: Week 4 lecture with Alysha Goheen	
Week 5 June 7 th -13 th	Annual Giving, Online Fundraising, & Events	Read: 1. Chapters 10, 11, & 19 (Sargeant & Shang) 2. Article: Three Major Components of a Successful Annual Giving Campaign 3. Disaster Recovery fundraising Watch & Listen: Week 5 lecture	Discussion Board: Post due 6/9. Reply to peers due 6/13.
Week 6 June 14 th -20 th	Donor Retention & Major Giving	Read: 1. Chapters 12 & 13 (Sargeant & Shang) 2. Power Questions article 3. 2016 High Net Worth Philanthropy Report (skim) Watch & Listen: Week 6 lecture with Kate Jennings	Assignment: Part 3 due 6/20 by midnight MST.
Week 7 June 21 st -27 th	Planned Giving & Bequests	Read: 1. Chapters 14 & 15 (Sargeant & Shang) 2. Bequests article 3. Planned Giving Marketing Watch & Listen: Week 7 lecture	Discussion Board: Post due 6/23. Reply to peers due 6/27.
Week 8 June 28 th -July 4 th	Corporate Giving & Grantwriting	Read: 1. Chapters 16 & 17 (Sargeant & Shang) 2. Hidden Costs of CRM article	Part 3: Fundraiser Analysis due 7/5 <ul style="list-style-type: none"> • 1 day extension due

		3. The Overhead Myth article Watch & Listen: Week 8 lecture with Keri McWilliams TEDx: The way we think about charity is dead wrong	to July 4 th holiday
Week 9 July 5 th -11th	Ethical Fundraising & Public Confidence	Read: 1. Chapters 3 & 21 (Sargeant & Shang) 2. Give.org's Donor Trust Report (PDF on Moodle) 3. Ethical Fundraising links(2) Watch & Listen: Week 9 lecture	Discussion Board: Building public trust at your organization. Post due 7/7. MST. Reply to peers due 7/11.
Week 10 July 12 th -16th	Special Topics in Fundraising	Read: 1. Chapter 22 (Sargeant & Shang) Watch & Listen: TEDx talk: How Money Can Buy You Happiness	Final fundraising plan due Friday, July 16th by midnight MST