

UNC-Chapel Hill School of Social Work
Marketing and Fundraising for Nonprofit Organizations (SOWO 883)
Fall 2020

Instructor: LaKeshia Jones Foushee, MSW

ljones12@email.unc.edu

Office Hours: By appointment

Course Description: This course will enable students to develop skills and practices in marketing and fundraising strategies for nonprofit organizations at the macro level.

Course Credit Hours: 3.0

Course Objectives:

The purpose of this course is to help students understand the marketing and fundraising challenges facing nonprofits in today's economy and to apply the appropriate marketing and fundraising strategies to address them. After completing this course, students will be able to:

- Document the dimensions, importance and challenges of marketing nonprofits;
- Assess the marketing orientation of a nonprofit;
- Develop a nonprofit mission statement;
- Utilize research and strategic planning in marketing nonprofits;
- Develop a marketing communication and promotion strategy for nonprofits;
- Understand contemporary fundraising trends and why people give;
- Position a nonprofit to raise funds;
- Review legal, ethical and organizational prerequisites for fundraising;
- Prepare a fundraising plan unique to an organization's mission;
- Develop fundraising strategies to cultivate and solicit donors;
- Develop and write grant proposals to foundations and corporations.

Expanded Description:

Marketing and fundraising are critical to the success of all non-profit organizations. This course explores current and emerging fundraising and marketing strategies that have proven successful for both small and large organizations. SOWO 883 is experiential; that is, students will have the opportunity to create their own portfolio of marketing and fundraising materials and practice effective donor solicitation and stewardship strategies. We will also explore fundraising ethics, donor research, and the role of nonprofit executives and volunteers in fundraising and marketing.

Class sessions are organized into two major units:

Unit 1 – Marketing for Nonprofits: Marketing definitions; the importance of strategic planning; determining your audience; effective messaging; how to use social media effectively; putting it all together in a marketing plan.

Unit 2 – Fundraising: Planning for fundraising; ethical issues; why people give; current trends in fundraising; managing volunteers; how to ask for a gift; annual, planned and capital

giving; working with foundations and corporations; identifying and cultivating prospective donors; developing a case for support; managing donor information and gift processing.

Required Texts/Readings:

Miller, Kivi Leroux. (2010). *The Nonprofit Marketing Guide: High-Impact, Low-Cost Ways to Build Support for Your Good Cause*. San Francisco, CA: Jossey Bass.

Weinstein, Stanley. (2017). *The Complete Guide to Fundraising Management*, 4th edition. Hoboken, NJ: John Wiley and Sons.

These texts are available in the student bookstore. Other required or suggested readings are listed by the class sessions.

Teaching Methods:

This course relies on students’ active participation and engagement. Students will be expected to present their work to the class and are encouraged to discuss and ask questions about fundraising and marketing-related issues that they are encountering in field placements or other settings.

Class Assignments:

Students will be evaluated based on the following:

Assignment	Points	Date Due
Class Attendance	5	Ongoing
Class Participation	12	Ongoing
Weekly Assignments	8	Ongoing
Marketing Plan	25	Friday, Sept. 18, 7:00 PM EST
Annual Fund Plan	25	Friday, Oct. 16, 7:00 PM EST
Foundation Proposal	25	Friday, Nov. 13, 7:00 PM EST

Below is an overview of each assignment. A more detailed outline of the requirements and instructions for the assignments will be discussed in class and will be posted on the course Sakai site in the assignments folder.

Class Attendance (5 points)

Students will be awarded attendance points as follows:

- No more than one class missed 5 points
- Two classes missed 3 points
- Three or more classes missed 0 points

Please speak with the instructor as soon as possible if you have extenuating circumstances that will result in you missing, being later for, and/or needing to leave early from class.

Class Participation (12 pts.)

Participation points will be awarded based on the instructor’s assessment concerning the extent to which the student a) was prepared for class having completed the readings; b) made active and

thoughtful contributions to class discussions and learning activities; and c) contributed to a positive and constructive team learning environment and experience.

Weekly Assignments (8 pts.)

Students will have a series of short assignments that will be used as a basis for class discussion and enhanced understanding of key concepts.

Marketing Plan (25 pts.)

Students will create a comprehensive Marketing Plan for the nonprofits they create in class. The plan should:

- Set achievable goals
- Identify target markets
- Articulate messages
- Outline specific strategies to achieve goals
- Assign resources to implement strategies
- Define time frames
- Establish indicators of success
- Determine how progress will be monitored and evaluated

We will use class time for students to discuss their plans and receive feedback from each other and from the instructor.

Annual Fund Plan (25 pts.)

Students will create a comprehensive Annual Fund Plan for the nonprofits they create in class. The plan should:

- Segment donors
- Outline the communication plan
- Outline the budget for each piece of the plan
- Define time frames
- Establish indicators of success

Foundation Proposal (25 pts.)

Students will research foundations that make grants in their nonprofits' area of expertise. The proposal of no more than four pages should address the following points:

- A brief, descriptive title for your proposal concept
- What you are asking the foundation to fund
- Methodology (how will you accomplish your goals; what are your strategic plans for carrying out the project; who are your partners; does the project have a regional or national scope)
- Measurable outcomes/evaluation (how will you know if the project has been successful)
- Detailed budget
- Sustainability, if applicable
- Why is your organization uniquely positioned to implement this type of project/program

Grading System:

For the Fall 2020 semester all grades at the School of Social Work are based on the following scale:

94 and above	H
74-93	P
70-73	L
69 and below	F

Policy on Incompletes and Late Assignments:

Assignments are considered late if they are handed in any later than the due date and time specified in the syllabus. The grade for late papers will be reduced **5% per day, including weekends**. Similarly, a paper due at 6:00 PM on Monday handed in at 7:00 PM will be considered 1 day late.

A grade of **Incomplete** is given only in exceptional and rare circumstances that warrant it, e.g. family crisis, serious illness. It is the student's responsibility to request and explain the reasons for an Incomplete. The instructor has no responsibility to give an Incomplete without such a request.

Policy on Academic Dishonesty:

It is the responsibility of every student to obey and to support the enforcement of the Honor Code, which prohibits lying, cheating, or stealing in actions involving the academic processes of this class. Students will properly attribute sources used in preparing written work and will sign a pledge on all graded coursework certifying that no unauthorized assistance has been received or given in the completion of the work. **All written assignments should contain a signed pledge from you stating that, "I have not given or received unauthorized aid in preparing this written work."** Credit will not be awarded for unpledged work.

Please refer to the *APA Style Guide*, *The SSW Manual*, and the SSW Writing Guide for information on attribution of quotes, plagiarism and appropriate use of assistance in preparing assignments. In keeping with the UNC Honor Code, if reason exists to believe that academic dishonesty has occurred, a referral will be made to the Office of the Student Attorney General for investigation and further action as required.

Expectations for written assignments/APA Formatting:

Students are expected to use good academic English; grades will be lowered for poor grammar, syntax, or spelling. Those who have difficulty writing can use online resources of the School of Social Work (<http://ssw.unc.edu/students/writing>) or campus Writing Center (<http://writingcenter.unc.edu/>). Please follow **APA format** for in-text citations and references.

**SOWO883 will be taught fully virtually. In the case an in-person meeting is necessitated the following policy applies.*

Community Standards in Our Course and Mask Use:

This fall semester, while we are in the midst of a global pandemic, all enrolled students are required to wear a mask covering your mouth and nose at all times in our classroom. This requirement is to protect our educational community -- your classmates and me -- as we learn together. If you choose not to wear a mask, or wear it improperly, I will ask you to leave immediately, and I will submit a report to the [Office of Student Conduct](#). At that point you will be disenrolled from this course for the protection of our educational community. Students who have an authorized accommodation

from Accessibility Resources and Service have an exception. For additional information, see <https://carolinatogether.unc.edu/university-guidelines-for-facemasks/>

Policy on Accommodations for Students with Disabilities:

Students with disabilities that affect their participation in the course and who wish to have special accommodations should contact the University's Disabilities Services (<http://disabilityservices.unc.edu>) and provide documentation of their disability. Disabilities Services will notify the instructor that the student has a documented disability and may require accommodations. Students should discuss the specific accommodations they require (e.g. changes in instructional format, assignment format) directly with the instructor.

Accessibility and Resources Services:

The School of Social Work aims to create an educational environment that supports the learning needs of all students. The University of North Carolina – Chapel Hill facilitates the implementation of reasonable accommodations, including resources and services, for students with disabilities, chronic medical conditions, a temporary disability, or pregnancy complications resulting in difficulties with accessing learning opportunities. The Accessibility Resources and Service (ARS) Office at UNC has been established to coordinate all accommodations. If you might need accommodations at any point during the semester, please contact ARS prior to the beginning of the semester or as early in the semester as possible so that they can assist you; this process takes time. You can visit their website at <http://accessibility.unc.edu>, and contact ARS by email: accessibility@unc.edu or phone at 919-962-8300. The accommodations process starts with ARS and helps instruct Faculty at the School of Social Work on how best to proceed. As a School, we are committed to working with ARS and students to implement needed accommodations for all of our students. In addition to seeking ARS supports, please also reach out to your instructor to communicate how best your needs can be met once you have begun the ARS process.

Equal Opportunity and Compliance (EOC) Statement:

Acts of discrimination, harassment, interpersonal (relationship) violence, sexual violence, sexual exploitation, stalking, and related retaliation are prohibited at UNC-Chapel Hill. If you have experienced these types of conduct, you are encouraged to report the incident and seek resources on campus or in the community. Please contact the [Director of Title IX Compliance, Report and Response Coordinators, Counseling & Psychological Services](#) (confidential), or the [Gender Violence Services Coordinators](#) (confidential) to discuss your specific needs. Additional resources are available at safe.unc.edu.

Writing Support:

Clear, cogent writing is an essential skill for social work professionals. Writing support is available to all students through the School's Writing Support Team; they can help you strengthen your writing skills by sharing strategies for organizing information, presenting a cohesive argument, ensuring clear communication, and mastering APA style. Writing Support offers a *learning opportunity* for students but does not merely copy edit student papers. Writing support is available in-person, by e-mail, or by phone. E-mail a requested appointment day and time to SOSWwritingsupport@gmail.com. In addition, see the Writing Resources and References page on the School's website (under the Current Students tab: <https://ssw.unc.edu/students/writing>).

READINGS AND COURSE OUTLINE

Class 1 – August 11 Introduction

Objectives:

- Get to know one another
- Review students' nonprofit-related experiences and learning goals
- Review course content, process, and expectations
- Understand the importance of mission, vision and values statements
- Conduct a “big idea” exercise in which students create their own nonprofits that they will use as a practice model for fundraising and marketing

Assignment (Due 8/18): In no more than one page, answer the following six questions about your organization:

1. Who? What's the name of your organization?
2. What? What kind of organization are you (scale and sector)?
3. For whom? Whom do your programs serve?
4. What need? What pressing social problem does your organization address?
5. What's different? What's distinctive about your program?
6. So what? Why should we care?

Be prepared to use your answers in class on 8/18.

Class 2 – August 18 The Strategic Marketing Process

Objectives:

- Understand the importance of strategic planning
- Define marketing and understand how marketing in the nonprofit world is similar/different from marketing in public or for-profit organizations
- Understand marketing elements and functions
- Describe how mission, vision and values statements are crucial to marketing
- Understand the increasing importance of marketing in the nonprofit sector

Readings:

Miller, pgs. 1-36

Gottlieb, Hildy (2007). Three Statements That Can Change the World: Mission/Vision/Values.

Retrieved from: http://www.help4nonprofits.com/NP_Bd_MissionVisionValues_Art.htm

Richardson, Carl (2004). Strategic Planning: Five Steps to a More Secure Future. *Philanthropy Journal*.

Retrieved from: <http://www.philanthropynewsdigest.org/columns/the-sustainable-nonprofit/strategic-planning-five-steps-to-a-more-secure-future>

Class 3 – August 25 The Importance of Market Research and Identifying Your Target Audience

Objectives:

- Understand how to collect and utilize market research
- Identify and segment your target audiences
- Understand the elements of a marketing plan

Readings:

Miller, pgs. 39-48

Levy, Howard Adam. (2010). *Conducting Market Research for Your Nonprofit*. Retrieved from:
<http://redroostergroup.com/wp-content/uploads/2010/09/ConductingResearch.pdf>

Network for Good. 7 Steps for Creating Your Best Marketing Plan Ever. Retrieved from:
<http://www.fundraising123.org/files/training/7%20Steps%20to%20Creating%20Your%20Best%20Nonprofit%20Marketing%20Plan%20Ever.pdf>

Assignment (Due 9/1): Conduct a market research interview with a minimum of one faculty or staff member and one student at UNC. For the purposes of this assignment, questions can be sent to participants to answer via email or a phone/video interview could be conducted.

Collect the following information:

**Note:* The demographic information is optional for the interviewee to answer.

1. Age Range 17-21; 22-25; 26-30; 31-40; 41-50; 51-65, 66-80; 81+
2. Gender Identity
3. Racial/Ethnic Identity
4. Number of years at UNC
5. School they identify with (Which school do they attend/teach at?)

Ask the following questions about UNC School of Social Work:

1. What was your initial perception of the School? How has that perception changed?
2. How would you describe our mission?
3. How would you describe our vision?
4. What do you consider our strengths? What can we improve upon?
5. What is the one word you would use to describe our organization?
6. Have you visited our website? When was the last time? How often do you visit?
7. If you were to write a tagline for us, what would it be?
8. If you could change one thing about the School, what would it be?

Record the answers to these questions and be prepared to use them in class on 9/1.

Class 4 – September 1 Positioning, Branding and Telling Your Story

Objectives:

- Understand the distinction between positioning and branding

- Identify and describe your nonprofit's competitors
- Understand the effectiveness of various marketing methods and learn to create a mix for your target audiences
- Understand why elevator speeches are important and how to craft an effective one

Readings:

Miller, pgs. 49-61

LePla, Joe. What is Branding? Retrieved from: <http://www.messagesmatter.com/branding-defined/>

Kanzler, Ford. (2002). The Positioning Statement: Why to Have One Before You Start Communicating. Retrieved from: <http://www.marketingprofs.com/tutorials/kanzler1.asp>

Class 5 – September 8 Social Media Marketing and Putting It All Together: The Marketing Plan

Objectives:

- Understand the effective use of social media
- Describe effective techniques for communicating your nonprofit's "story"
- Understand how to evaluate social media marketing
- Understand how to evaluate a marketing plan

Due In Class: You will be expected to have a draft of your Marketing Plan prepared prior to class (5:30 EST on 9/8) for discussion and feedback.

Readings:

Miller, pgs. 63-90, 137-139

Campbell, Julia. (2014, March 5). 5 Stories Nonprofits Should Be Telling On Social Media. Retrieved from: <http://jcsocialmarketing.com/2014/03/5-stories-nonprofits-telling-social-media/>

Class 6 – September 15 Overview of Philanthropy

Objectives:

- Understand the philanthropic landscape in the U.S.
- Describe why people give
- Review fundraising ethics
- Review the fundraising cycle
- Review elements of an integrated development program

Due 9/18 (7:00 PM EST): Marketing Plan

Readings:

Weinstein, chapters 1 & 2, pgs. 45-48

Brooks, Arthur C. (2014, March 30). Why Fundraising is Fun. *New York Times*. Retrieved from: <http://www.nytimes.com/2014/03/30/opinion/sunday/why-fund-raising-is-fun.html? r=0>

Class 7 – September 22 Identifying Your Donors and Managing Information

Objectives:

- Describe the infrastructure necessary for fundraising
- Use research sources to identify potential donors
- Understand the true need for development operations
- Understand how to power map

Readings:

Weinstein, chapters 3, 5 and 6

Semple, Maria. Going Beyond Google To Find and Research Prospects. Retrieved from: <http://www.thenonproffitimes.com/news-articles/going-beyond-google/>

Class 8 – September 29 The Annual Campaign and Working with Volunteers

Objectives:

- Understand strategies for securing annual gifts
- Describe why annual gifts are crucial for an organization's future
- Understand effective annual fundraising strategies
- Describe techniques for engaging volunteers in fundraising

Readings:

Weinstein, chapters 9, 10, and 15

Reynolds, Kimberly. How to Write a Fundraising Letter. Retrieved from: <http://www.fundraiserhelp.com/how-to-write-a-fundraising-letter.htm>

Class 9 – October 6 Cultivating Major Gifts

Objectives:

- Understand the importance of cultivation and developing a solicitation strategy for your donors
- Describe ways to build relationships with a variety of potential donors
- Learn strategies for effectively articulating your case for support

Readings:

Weinstein, chapters 7 & 8

Kelly, Mark. 5 Major Donor Cultivation Strategies. Retrieved from: <https://www.salsalabs.com/blog/major-donor-cultivation-strategies>

Dove, Kent E. The Art and Science of Personal Solicitation. Retrieved from:
<http://majorgiving.cpb.org/downloads/pdf/dove.pdf>

Class 10 – October 13 Advocacy and Making the Ask

Objectives:

- Understand how advocacy can aid in funding from the government and how elected officials are the key to successful governmental fundraising
- Understand and practice how to ask for money and deal with objections

Due 10/16 (7:00 PM EST): Annual Fund Plan

Readings:

Dove, Kent E. The Art and Science of Personal Solicitation. Retrieved from:
<http://majorgiving.cpb.org/downloads/pdf/dove.pdf>

<http://www.youtube.com/watch?v=jjYV3k5-yzw>

Class 11 – October 20 Corporate and Foundation Fundraising

Objectives:

- Understand effective techniques for raising money from foundations and corporations
- Learn how to craft a funding menu
- Identify possible foundations and corporate funders for your nonprofit
- Learn how to write effective grant proposals

Readings:

Weinstein, chapter 12

Scrivens, Jenny. Examining the Corporate-Nonprofit Partnership. Retrieved from:
<https://www.ourpublicgood.com/blog/examining-the-corporate-nonprofit-partnership>

Assignment (Due 10/27): In no more than two pages, create a financial case for hosting the event outlined in the Assignments folder. Make sure to address each question outlined.

Be prepared to discuss in class on 10/27.

Class 12 – October 27 Capital Campaigns and Special Events

Objectives:

- Describe the purpose and benefits of a capital campaign
- Understand necessary elements of campaign planning
- Describe advantages and disadvantages of special events
- Understand the necessary elements of event planning

Readings:

Weinstein, chapters 11 & 14

Heller, Peter. (2012, April 13). Avoiding Capital Campaign Mistakes. *Philanthropy Journal*. Retrieved from: <https://pj.news.chass.ncsu.edu/2012/04/13/avoiding-capital-campaign-mistakes/>

Assignment (Due 11/10): Write a thank you note to one of your donors using the guidelines in the readings listed under Class 13 and **be ready to use in class on 11/10.**

NO CLASS – November 3

Objectives:

- Exercise your right to Vote!

Class 13 – November 10 Stewarding and Upgrading Donors, Wrap-Up and Course Evaluations

Objectives:

- Understand the importance of thanking donors
- Learn how to craft a donor acknowledgement plan
- Describe techniques and strategies for increasing gifts from individual donors

Due 11/13 (7:00 PM EST): Foundation Proposal

Readings:

Miller, pgs. 141-149

Andresen, Katya & Jocelyn Harmon. Thanks a Million: How to Thank Your Donors So They'll Come Back and Give More. Retrieved from:
http://www.fundraising123.org/files/NP911_011210_Slides.pdf

These 12 Ways to Thank Donors Will Keep Them from Saying Goodbye. Retrieved from:
<http://www.nonprofitHub.org/featured/best-donor-thank-you-letters/>