

Annual and Major Gift Fundraising for Nonprofit Organizations

Course: SBNM 5771 **Academic Year:** 2012/13 **Semester/Quad:** Fall Quad B

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Availability:

Office hours are available by appointment. Accessible by phone and email Monday-Friday and will respond within one business day.

Course Description:

This course will be an in-depth look at the techniques and processes by through which financial resources are secured by nonprofit administrators. Specific attention will be given to various fundraising methods (such as direct mail, in-person solicitations, events, and online solicitations) and how these elements can be integrated to develop a comprehensive fundraising program.

Introductory Comments:

Financial stability of a nonprofit organization depends on its fundraising efforts. It is essential that leaders of nonprofits are equipped to fundraise successfully in order to build sustainability and secure the resources necessary to execute their mission. This course will be designed to teach students how to not only build relationships and ask for funding, but how to properly communicate with supporters for lasting partnerships. During the seven weeks, this course will educate students about various resources available to help equip an organization to effectively operate a fundraising program.

This class will provide the tools to understand, analyze and implement a development program. Theory will be discussed, but the course is designed to examine how theory is applied in real-world settings. In order to do this, **you are required to have access to a nonprofit organization** for which you can complete assignments throughout the course and particularly the final project. You should identify the organization you wish to work with **before** the beginning of this course. You will need access to the organization's fundraising staff and data. It is common for students to use an organization for which they work or volunteer.

If you are having difficulty identifying a nonprofit organization with which to work, please contact Professor Nabasny or Professor Bowyer immediately.

Course Materials:

- Dove, Kent E., Lindauer, Jeffrey A., and Madvig, Carolyn P. (2001). *Conducting a Successful Annual Giving Program*. San Francisco, CA: Jossey-Bass. ISBN 0-7879-5649-X
- Panas, Jerold. (2006). *Asking: A 59-Minute Guide to Everything Board Members, Volunteers, and Staff Must Know to Secure the Gift*. Medfield, MA: Emerson & Church Publishers. ISBN 1-889102-17-2
- Walker, Julia Ingraham. (2006). *Nonprofit Essentials Major Gifts*. Hoboken, NJ: John Wiley & Sons, Inc. ISBN-10:0471738379; ISBN-13:978-0471738374
- Some additional readings will be accessed through the course site.

Essential IDEA Objectives:

1. Learning fundamental principles, generalizations, or theories.
2. Learning to apply course material (to improve thinking, problem solving, and decisions).
3. Developing specific skills, competencies, and points of view needed by professionals in the field most closely related to this course.

Specific Course Objectives:

This course will teach students how to build a comprehensive fundraising program at a nonprofit organization of any size. All aspects relating to and affecting annual and major gift fundraising will be discussed, and resources for ongoing learning will be shared.

Course Methodology:

Students are required to find a nonprofit organization that they can analyze for class assignments and discussions. Examples of various fundraising pieces will be needed for assignments and in-depth research will be needed to effectively determine best practices in fundraising. In classes, students are encouraged to engage in dialogue to share experiences and ideas.

Computer Requirements:

In order to effectively participate in and successfully complete this course, each participant will need to have access to a computer and a high-speed internet connection. Please visit <http://www.northpark.edu/Current-Students/Computer-Services/Network/Minimum-Requirements.aspx> for information on computer requirements.

WEEKLY SCHEDULE

Week	Dates	Topics	Assignment(s)
1	Oct 24	<i>Nabasny/Bowyer-Fundraising Basics</i> <ul style="list-style-type: none">• Introductions• Mission and Case• Annual vs Major Gifts• Fundraising Cycle	<i>Dove: Intro, Chapter 1, Resource 23</i> <i>Walker: Chapters 1, 4</i> <i>Panas: Page 108</i>
2	Oct 31	<i>Bowyer-Annual Fund Campaigns:</i> <ul style="list-style-type: none">• Budgeting• Annual Fund Branding• Events• Text-to-Give	<i>Dove: Chapters 2-4, 6, Resources 1, 2, 11, 19, 20</i> <i>Daniel: A Realistic Look at Annual Funds</i> <i>Assignment: Mission & Case Analysis</i>
3	Nov 7	<i>Nabasny-Annual Fund Campaigns: Part 2</i> <ul style="list-style-type: none">• Direct Mail• Phonathon• Online Giving/Social Media	<i>Dove: Chapters 5, 7, Resources 8, 12-16, 18, Social Media links/articles</i> <i>Assignment: Events Analysis</i>

Week	Dates	Topics	Assignment(s)
4	Nov 14	<i>Bowyer-Major Gifts</i> <ul style="list-style-type: none"> Elevator Pitch In-Class Prospect Identification and Research Prospect Qualification Cultivation Donor Motivation 	<i>Dove: Chapter 11, Resources 21, 25, 26</i> <i>Walker: Chapter 2</i> <i>Panas: Chapters 1-9</i> <i>Assignment: Annual Fund Analysis</i>
5	Nov 28	<i>Nabansy-Major Gifts: Part 2</i> <ul style="list-style-type: none"> In-person Solicitation Written Proposals Stewardship Gift Acceptance Policies Types of Gifts 	<i>Dove: Chapters 8, 9, 11</i> <i>Walker: Chapters 3, 5 - 7</i> <i>Panas: Chapter 10 - end of the book</i> <i>Assignment: Written Proposal</i>
6	Dec 5	<i>Bowyer-Building Comprehensive Fundraising</i> <ul style="list-style-type: none"> Michael Kaiser cycle Communications Reporting Integrating Annual and Major Gifts 	<i>Dove: Chapter 12, Resources 27, 28</i> <i>Walker: Chapter 8</i> <i>Hejnal: What Counts?</i> <i>Kaiser White Paper</i> <i>Assignment: Major Gifts Analysis</i>
7	Dec 12	<i>Nabansy-Fundraising Trends and Resources</i> <ul style="list-style-type: none"> Future Trends Resources 	<i>Assignment: Final Presentation</i> <i>Final Paper due by 5:00pm on Dec 19, 2012</i>

Grading:

Assignment	Due Date	Points	Grade %
#1) Mission & Case Statement Analysis	10/31/12	30	15%
#2) Events Analysis	11/7/12	20	10%
#3) Annual Fund Analysis	11/14/12	30	15%
#4) Written Proposal	11/28/12	20	10%
#5) Major Gifts Analysis	12/5/12	30	15%
#6) Final Presentation	12/12/12	20	10%
#7) Final Paper	12/19/12	50	25%
Total		200	100%

Grade Mapping:

A/A- Assignment addresses questions, shows clear understanding of material, and is well-written.

B+/B Assignment moderately supports questions and materials, and has few writing errors.

C Assignment does not fully address questions or show clear understanding of materials and writing shows more than a few errors.

C- Assignment is below any of the standards listed above.

Assignment Grading Policies:

Late assignments will be accepted up to one week after the due date if an extension has been requested prior to the due date. One letter grade will be deducted for late assignments if an extension was not requested. Assignments more than two weeks late will not be graded.

Student Responsibilities:

Students are expected to attend every class and turn in assignments digitally prior to the beginning of class. No online discussion will be used, so students are encouraged to bring dialogue to class and engage with other students and the instructors to determine best practices for fundraising.

Instructor Responsibilities:

Students can expect the instructors to give perspectives from varying diverse nonprofit sizes and fundraising budgets, in order to prepare students for nonprofit fundraising at any organization. Emails will be responded to within one business day of receipt, and instructors will be available for office hours by appointment.

ASSIGNMENT SPECIFICATIONS

Overview:

Assignments should be sent digitally to both professors by 5pm on the due date.

ASSIGNMENT #1 Mission & Case Statement Analysis

Assignment Specifications: Write an analysis of a nonprofit's mission and case statement. *Due by 5pm Oct 31.*

- 1) *Submit the organization's mission statement and provide a one paragraph analysis of its effectiveness, given your current knowledge of the organization. (10 pts)*
- 2) *Revise or draft a case for support for the organization. (2 pages, 20 pts)*

ASSIGNMENT #2 Events Analysis

Assignment Specifications: Prepare an Event Timeline and Post-Event Summary. *Due by 5pm Nov 7.*

- 1) *Prepare an event timeline. (1 page = 10 pts)*
- 2) *Write a post-event summary analyzing a recent event your organization held. Review changes and recommendations for the next time this event occurs. (1 page = 10 pts)*

ASSIGNMENT #3 Annual Fund Analysis

Assignment Specifications: Analyze the organization's current annual fund program and provide recommendations for growth. *Due by 5pm Nov 14.*

- 1) *Identify total revenues and expenses for the last two fiscal years. (10 pts)*
- 2) *Define the organization's annual fund and its effectiveness. (10 pts)*
- 3) *Identify and assess three solicitation techniques the program uses. (10 pts)*

ASSIGNMENT #4 Written Proposal

Assignment Specifications: Draft a personalized proposal to a prospective major gift donor. *Due by 5pm Nov 28.*

- 1) *Outline a specific case for support and ask for the donor. (10 pts)*
- 2) *Discuss the impact the gift would have on the organization and include appropriate stewardship/recognition information. (10 pts)*

ASSIGNMENT #5 Major Gifts Analysis

Assignment Specifications: Complete an analysis of the organization's major gifts program. *Due by 5pm Dec 5.*

- 1) *Describe the organization's current major gifts program or recommend a plan to implement a major gifts program. (10 pts)*
- 2) *Identify and assess two solicitation techniques the organization uses. (10 pts)*
- 3) *Document a moves plan for a major gift prospect to your organization. (10pts)*

ASSIGNMENT #6 FINAL PRESENTATION

Assignment Specifications: Prepare a 10 minute presentation of your findings and recommendations. *Due by 5pm Dec 12.*

- 1) *Present the major findings and recommendations of your analysis of the organization's annual and major gift program; include specific recommendations and next steps for the organization. (10 pts)*
- 2) *Use appropriate and effective visual aids. (10 pts)*

ASSIGNMENT #7 FINAL PAPER

Assignment Specifications: Write a 3-5 year fundraising plan for the organization. *Due by 5pm Dec 19.*

- 1) *Identify at least 5 major goals for the organization. Recommend specific funders and donors for growth under each goal. (Minimum 2 pages = 20 pts)*
- 2) *Build a cultivation plan and stewardship plan into goals, and identify specific action steps to engage and retain donors. (Minimum 2 pages = 20 pts)*
- 3) *Make any other recommendations for the organization that could improve fundraising efforts. (1 page = 10 pts)*

POLICY STATEMENTS

Academic Honesty

In keeping with our Christian heritage and commitment, North Park University and the School of Business and Nonprofit Management are committed to the highest possible ethical and moral standards. Just as we will constantly strive to live up to these high standards, we expect our students to do the same. To that end, cheating of any sort will not be tolerated. Students who are discovered cheating are subject to discipline up to and including failure of a course and expulsion.

Our definition of cheating includes but is not limited to:

1. Plagiarism – the use of another’s work as one’s own without giving credit to the individual. This includes using materials from the internet.
2. Copying another’s answers on an examination.
3. Deliberately allowing another to copy one’s answers or work.
4. Signing an attendance roster for another who is not present.

In the special instance of group work, the instructor will make clear his/her expectations with respect to individual vs. collaborative work. A violation of these expectations may be considered cheating as well. For further information on this subject you may refer to the Academic Dishonesty section of the University’s online catalog.

In conclusion, it is our mission to prepare each student for a life of significance and service. Honesty and ethical behavior are the foundation upon which such lives are built. We therefore expect the highest standards of each student in this regard.

Attendance Policy for Graduate Courses

The graduate courses in the SBNM are all 7 weeks in length. Missing one class session is allowed without penalty as long as all readings and assignments are made up by the student within a reasonable time period (the following week) and the instructor is notified in advance. Failing to log into an online course site for an entire week is allowed, but a penalty may be applied at the instructor’s discretion. Missing a second class session is allowed only in unusual circumstances by prior arrangement with the instructor. Since this represents almost 30% of the engagement time for the course, the student runs the risk of receiving a lower overall grade for the class. Faculty are encouraged to drop the course grade by a full

letter grade in this situation. A student who misses three classes (or the equivalent for an online class) will automatically fail the course, unless the student drops the course before the seventh week of class. Students who drop a course will be held responsible for tuition, based upon the current North Park University policy outlined in the University Catalog (found on the NPU website).

Attendance Policy for Undergraduate Courses

Attendance and participation are vital. Thus, students are expected to attend every class session, and to arrive on time – tardiness is undesirable and disruptive to your fellow classmates. This course has a strict requirement of documented, advance notification. If you are unable to attend any class session, you are to inform me (preferably by email) **prior to** that session. You need to provide a reason for your absence. Failure to provide advance notification will result in an unexcused absence. Be advised that poor attendance can affect your grade adversely

APA Requirement

The School of Business and Nonprofit Management (SBNM) has adopted the *Publication Manual of the American Psychological Association* (APA) as the standard and required format for all written assignments in SBNM courses. Our goal in adopting the *APA Manual* is to enhance student learning by:

- 1) Improving student's writing skills.
- 2) Standardizing the required format of all written assignments in all SBNM courses.
- 3) Emphasizing the importance of paper mechanics, grammatical constructs, and the necessity of proper citations.
- 4) Holding students accountable for high quality written work.

If you are unfamiliar with the requirements of the *APA Manual*, we recommend that you purchase the reference manual and/or that you consult one or more of the suggested resources as listed on the Student Resources section of the SBNM website. ***It is your responsibility to learn and ensure that all written work is formatted according to the standards of the APA Manual.***

Students with Disabilities

Students with disabilities who believe that they may need accommodations in this class are encouraged to contact your program's office (Business: 773-244-6270). Please do so as soon as possible to better ensure that such accommodations are implemented in a timely manner. For further information please review the following website: <http://www.northpark.edu/ada>