

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

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. Diverse aspects relating to and impacting 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 are needed for assignments and in-depth research will be needed to effectively determine best practices in fundraising. In class, 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/Campus-Life-and-Services/Information-Technology/Network/Minimum-Requirements> for information on computer requirements.

WEEKLY SCHEDULE

Week	Dates	Topics	Assignments
1	Oct 24	<i>Nabansy/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">• Elevator Pitch In-Class• 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> Assignment Due: Mission Statement & Case for Support/Elevator Pitch
3	Nov 7	<i>Nabansy-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</i> <i>Social Media links/articles</i> Assignment Due: Events Analysis

Week	Dates	Topics	Assignments
4	Nov 14	<i>Bowyer-Major Gifts</i> <ul style="list-style-type: none"> 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> Assignment: Annual Fund Analysis
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> Assignment: Written Proposal
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> Assignment Due: Major Gifts Analysis
7	Dec 12	<i>Nabansy-Fundraising Trends and Resources</i> <ul style="list-style-type: none"> Future Trends Resources 	Assignment Due: In-Class Presentation of Final Fundraising Analysis
	Dec 14		Assignment Due: Final Fundraising Analysis

Grading:

Assignment	Due Date	Points	Grade %
#1) Mission Statement & Case for Support/ Elevator Pitch	10/31/12	25	12.5%
#2) Event 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) Presentation of Fundraising Analysis	12/12/12	25	12.5%
#7) Final Fundraising Analysis	12/14/12	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.

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 and Case for Support/Elevator Pitch*

Assignment Specifications: Choose a nonprofit organization to study throughout the course. Analyze the organization's mission statement and case for support and prepare an elevator pitch. *Due by 5pm Oct 31.*

- 1) *Analyze the organization's mission statement; if one does not exist, create one.*
- 2) *Analyze the organization's case for support; if one does not exist, create one.*
- 3) *Be prepared to share an elevator pitch on your organization at next class on 10/31/12.*

ASSIGNMENT #2 *Events Analysis*

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

- 1) *Prepare an event planning timeline outlining steps and deadlines required for a successful event.*
- 2) *Write a post-event summary analyzing a recent event your organization held. Review changes and recommendations for the next time this event occurs.*

ASSIGNMENT #3 *Annual Fund Analysis*

Assignment Specifications: Complete an analysis of the organization's annual fundraising program. *Due by 5pm Nov 14.*

- 1) *Breakdown giving from donor publics over the previous and current fiscal years.*
- 2) *Analyze the organization's current annual fund operation.*
- 3) *Make recommendations for program growth. Recommend at least 3 areas that could grow or be implemented.*

ASSIGNMENT #4 *Written Major Gift Proposal*

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

- 1) *Create a written request for a major gift that is personalized for the donor.*
- 2) *Include relevant references to the organization's mission and case for support.*
- 3) *Outline donor recognition.*

ASSIGNMENT #5 *Major Gifts Analysis*

Assignment Specifications: Analyze the organization's major gifts program. *Due by 5pm Dec 5.*

- 1) *Analyze the current major gifts program in the organization.*
- 2) *Identify 3 areas in which the program could be improved and provide specific recommendations.*

ASSIGNMENT #6 *In Class Presentation of Fundraising Analysis*

Assignment Specifications: Present the major findings of your fundraising analysis. *Due by 5pm Dec 12.*

- 1) *Present your findings to the class as if you were presenting to the board.*
- 2) *Include discussion of what is effective in the organization's current operations.*
- 3) *Identify specific areas for improvement and offer concrete recommendations for change.*
- 4) *Effectively use visual aids.*

ASSIGNMENT #7 FINAL - Fundraising Plan

Assignment Specifications: Write an analysis of the organization's current fundraising operation and propose a 3-5 year fundraising plan. *Due by 5pm Dec 14.*

- 1) *Describe the organization's current annual and major gift program. Discuss elements that are working well for the organization and provide at least 5 specific recommendations for improvement or change.*
- 2) *Include cultivation plans and stewardship plans and identify specific action steps to engage and retain donors.*
- 3) *Propose a 3-5 year plan the organization could use to grow and provide specific action steps and metrics.*
- 4) *Make any other recommendations for the organization that could improve fundraising efforts.*

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). 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>