

North Park University
School of Business and Nonprofit Management
5771
Annual and Major Gift Fundraising
SPRING 2013 QUAD A -- ONLINE
2 Credit Hours

Syllabus

Course Instructor:

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Office hours: Wednesday before class or by appointment.

Classroom: ONLINE

Office Hours:

I will try to return phone calls or emails the same day, but certainly within 48 hours.

Introductory Comments:

All nonprofit organizations require resources to successfully execute their mission. In a time of decreased government funding, increased expectations of accountability on the part of nonprofits, and an economic downturn that negatively affected individual donors and funding entities, nonprofit organizations must work harder to raise the funds they need. Securing financial support requires a clearly articulated case, a well-developed plan to communicate that case to identified prospects, and the ability to implement effective solicitation strategies.

This class will provide you with 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.

*NOTE: You should identify the nonprofit organization you wish to work with **BEFORE** the beginning of this course. To complete the assignments 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 have difficulty identifying a nonprofit organization to work with, please contact Professor Lindahl immediately.*

The purpose of this course is to acquaint participants with the basic principles and practices of effective annual and major gift fundraising. By the completion of this course, students will have a comprehensive understanding of the process of raising gifts from individuals, the programs used to do so, how to steward donor relationships, and future trends that will impact fundraising.

The overarching learning objectives for this course are:

- Gaining factual knowledge.
- Learning fundamental principles, generalizations, and theories.
- Developing specific skills, competencies, and points of view needed by professionals in the field of fundraising.

The course is designed to help you achieve specific content-related learning objectives as well. By the end of the course, students will be able to:

1. Identify the key elements of an integrated development plan and articulate the purpose of each component.
2. Propose a written case for raising support for your organization, incorporating the organization's mission, goals and rationale for giving.
3. Evaluate the primary methods used for raising annual support and evaluate their effectiveness in your organization.
4. Understand basic prospect research tools and resources, determining which tools are most appropriate for varied constituencies and organizations.
5. Distinguish among major gift solicitation techniques and strategies and determine which approaches are most appropriate to particular situations.
6. Understand how to effectively integrate an annual giving and major gift program, balancing the two and creating a structure that is best suited for achieving the organization's goals.
7. Apply industry guidelines and resources for evaluating fundraising practices and programs.

Required Texts:

- E. Tempel, T. Seiler, E. Aldrich Editors (2011) *Achieving Excellence in Fundraising*, 3rd Edition, Jossey-Bass. ISBN: 978-0-470-55173-8
- Some additional readings will be accessed through the course site.

Course Teaching and Learning Methods:

This course is taught in an intensive format, and it is very important for students to keep up with readings, assignments and online discussions. You will be expected both to initiate discussions and to respond to other students' and the facilitator's postings.

The course facilitator expects that each student will provide constructive and timely feedback to other class members on assignments as required. While the course facilitator may also provide online feedback on assignments, grades for each course assignment will be given privately.

Course Schedule:

Generally, each week's content and assignments will run from Monday through Sunday. All work for a given week is due no later than 11:59pm on Sunday. The schedule for each of the seven weeks is clearly noted in each week's area of the course site.

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/cs/support/minreq.aspx> for information on computer requirements and <https://www.northpark.edu/cs/support/config.aspx> for network access.

Participant Responsibilities:

1. Attendance, presence, and full participation are required for this class. You cannot successfully complete this course without completing the weekly readings and assignments. Assignments will not be accepted after their due dates unless you have received prior approval from me to submit them late. No extensions will be possible for the final project. Grades for late assignments will automatically be lowered by 10% for each 24 hours beyond the due date.
2. Some assignments may be posted online for others to see. You will be asked to comment and provide feedback to one another on your work. I expect you to engage with each other in respectful, collegial dialogue. Use proper "netiquette" (see *A Guide to Netiquette in Course Information folder on Moodle*).
3. This intensive graduate-level course requires a significant commitment of time and work from all participants. Expect to spend 10-12 hours each week on the readings and assignments.
4. Any unforeseen circumstances that affect your ability to participate fully in the course should be communicated to me as soon as they arise.

Course Facilitator Responsibilities:

1. The course facilitator will design the course and learning modules in such a way that students have every opportunity to achieve the learning objectives.

2. The course facilitator will provide reactions to student responses and discussion as appropriate in order to clarify important ideas and concepts and build the discussion during the week by inserting follow-up questions.
3. The course facilitator will read and critically assess students' assignments and provide feedback, usually by the end of the following course week.
4. The course facilitator will typically respond to all student e-mails and phone calls on the same day, but certainly within 48 hours of receipt.

Attendance and Participation Expectations:

The Moodle site for this course is available 24 hours a day, 7 days a week. Students can complete their readings and assignments at any time throughout the defined week. Failing to log into the course site for an entire week will have a significant negative effect on the student's grade, and should only occur with prior approval from the professor. A student who misses a second week 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).

A significant portion of the work in this class involves participation in the course discussion forums, both original posts and responses to other students' posts. Posts should be substantive, thought-provoking and content-rich. Original posts should thoroughly address the assigned topic. Response posts should be constructive and should add substantively to the topic being discussed. Merely responding, "I agree" or "Well said" is not adequate. In all posts, grammar, spelling and punctuation matter, and deficiencies in any of these areas will result in a lower grade. Students are strongly encouraged to participate in the forums multiple times during the week to foster a robust and dynamic class conversation.

Confidentiality:

Some of the assignments in this course involve evaluating and critiquing components of your organization's program, receiving feedback on your program from other students, and providing feedback to other students on their organizations' program. These assignments are most meaningful if they are conducted with full candor about the programs' strengths and areas in need of improvement. In order for all students to feel comfortable completing these assignments candidly, the facilitator and all students will commit to a Confidentiality Pact during the first week of the course. This Pact is considered a part of the Academic Honesty code (see following section) and violation of this Pact will be considered cheating.

Academic Honesty:

Students in this course are expected to adhere to North Park University's academic honesty policy:

In keeping with our Christian heritage and commitment, North Park University (NPU) and the SBNM 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:

- Plagiarism – the use of another’s work as one’s own without giving credit to the individual. This includes using materials from the Internet.
- Copying another’s answers on an examination.
- Deliberately allowing another to copy one’s answers or work.
- 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 Catalog (available at www.northpark.edu). In conclusion, it is North Park’s mission to prepare you 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.

In addition, any violation of this course’s Confidentiality Pact (contained in the first week’s assignments) will be considered cheating.

Support Services:

Please see the Course Information area in your course in Moodle for the Student Support document if you need assistance during your course.

Disabilities Accommodations:

Students with disabilities who believe that they may need accommodations in this class are encouraged to contact the SBNM program office (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>.

Use of *APA Publication Manual*

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 Publication 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.*** Conformity with APA standards will be taken into account in grading all written assignments.

Grading

Each assignment will be graded on a points system. The number of points available for each assignment will be noted in a summary sheet on the course site, and in the assignment's field in the grade center. Rubrics will be provided for each assignment to show how points will be assessed.

Assignments:

With minor exceptions, each week's course content will consist of:

Readings, and occasionally other assigned resources
Participation in the course discussion forums
Individual or group assignments

Course Schedule:

Week 1:

Student Learning Objectives:

Students will become comfortable within the online environment and understand how to navigate Moodle. They will understand and be able to use basic fundraising terminology in their assignments and discussions. Students will understand the importance of a case statement and will draft or critique an existing case statement for their organization.

Topics:

- Course basics
- Introduction to annual fund and major gifts
- Mission statements/case for support

Week 2:

Student Learning Objectives:

By completion of this week, students will understand the key components of an annual fund program. Students will be able to identify best practices and will critique their organization's annual fund program.

Topics:

- Annual Fund Part I
 - Annual Plan
 - Donor Acquisition/Renewal
 - Direct Mail
 - Phonathon

Week 3:

Student Learning Objectives:

Students will demonstrate understanding of best practices by critiquing direct mail pieces and fundraising websites. Students will explore how emerging technology is being used for fundraising by nonprofits. By completion of this week, students will understand the role events play in fundraising at different types of organizations.

Topics:

- Annual Fund Part II
 - Events
 - Websites
 - Social Media
 - Donor Clubs/Gift Societies
 - In-person Solicitation/Major Gift Pipeline

Week 4:

Student Learning Objectives:

This week students will demonstrate an understanding of the fundraising cycle and how prospects move through the cycle. Students will master best practices for prospect research and will assess their organization's current research practices. They will review ethical standards for development and will review ways to engage volunteers in the fundraising process.

Topics:

- Major Gifts Part I
 - Types of Major Gifts
 - Prospect Research and Identification
 - Moves Management/Fundraising Cycle
 - Ethics
 - Donor Motivation
 - Gift Acceptance Policy/Pledge Form

Week 5:

Student Learning Objectives:

Students will demonstrate a thorough understanding of the solicitation process, including producing a written gift proposal. Students will explore possible objections that can be raised during solicitation and understand how to effectively overcome them.

Topics:

- Major Gifts Part II
 - Solicitation
 - Board Members/Volunteers
 - Written Proposals
 - Overcoming Objections

Week 6:

Student Learning Objectives:

Students will understand the importance of stewardship and donor relations in a successful fundraising program. They will assess their organization's current practices in stewardship and make recommendations for improvement.

Topics:

- Stewardship/Donor Relations
 - Gift Societies
 - Naming Opportunities
 - Reporting/Acknowledgement

Week 7:

Student Learning Objectives:

Students will explore how the annual fund and major gift programs should work together in a coordinated fashion. Students will demonstrate the ability to create a comprehensive and integrated fundraising plan through completion of their final project. Students will be informed about current trends that could impact the future of fundraising.

Topics:

- Integrating the Annual Fund and Major Gifts/Managing a Development Program
- Evaluation/Reporting
- Planning
- Future Trends

Final Project Due by 11:59pm SUNDAY March 3, 2013