

North Park University
School of Business and Nonprofit Management
Marketing 5772

Capital Campaigns for Nonprofit Organizations
Online Fall Quad A -- 2013
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Course Instructor

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Schedule

The course is divided into seven “weeks”. A course week generally runs from Monday through Sunday so that you can take advantage of weekend time to finish your assignments. The timeframe for each of the seven weeks is clearly delineated in this syllabus and in several locations on the course site. Although the Quad begins on a Monday, the course site will be open at least from the previous weekend to allow you to get started.

Office Hours

I will be on the course site frequently throughout the week. If you need to reach me by phone, please do not call after 9 p.m. Central Time. I check email frequently and try to respond to all emails and voice mails within 24 hours (unless traveling).

Course Description and Student Learning Objectives

This course focuses on campaigns as a fundraising technique for nonprofit organizations. Students will learn how organizations should plan, implement and manage campaigns, including program components such as goal-setting, the campaign plan, case statements, volunteer engagement, gift tables, naming levels, accounting and reporting, donor recognition and stewardship, and preparation for the post-campaign period.

Through the primary class project, students will apply the knowledge they are learning to an actual campaign in a real organization.

Students may expect to deepen their knowledge and mastery in the following campaign-related areas:

- ❑ Building and stating a campaign case for support
- ❑ Campaign timeline, logistics and operations
- ❑ Challenge Grants in Capital Campaigns
- ❑ Constructing and using a gift chart
- ❑ Cultivating and soliciting major gift prospects for campaign gifts
- ❑ Defining different types of campaigns

- ❑ Engaging leaders and volunteers in a capital campaign
- ❑ Campaign recognition and naming
- ❑ Dove Preparedness Index
- ❑ Establishing Campaign Committee Structure
- ❑ Ethics (integrated in course)
- ❑ Financial reporting for campaigns
- ❑ Incorporating planned giving into Campaigns
- ❑ Post-campaign Issues
- ❑ Preparing for a capital campaign
- ❑ Campaign Publications
- ❑ Rating Prospects in Capital Campaign
- ❑ Special Events
- ❑ Stalled Campaigns
- ❑ Stewardship
- ❑ Use of Campaign Consultants

There are three overarching objectives for the course:

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

At the end of the course you'll be asked to tell us (using the IDEA system) if you think the course achieved the objectives for you. Please keep them in mind as we move through the seven weeks.

Required Texts

Dove, Kent E. (2000). *Conducting A Successful Capital Campaign (Second Edition)*. San Francisco, CA: Jossey-Bass.

Kihlstedt, Andrea (2010). *Capital Campaigns: Strategies That Work*. Sudbury, MA: Jones and Bartlett Publishers.

Important Note: All of the required assignments, including the final project, require that you have access to a nonprofit organization on which you can base your work. To complete the assignments, you will need access to the organization's fundraising materials and you will need to speak with the organization's development staff or volunteers. It does not matter whether the organization is currently in a campaign, or even planning one. It is important, however, that the organization have an established development program, with at least one professional staffmember. It is common for students to use the organization for which they work, or an organization for which they volunteer. While large church organizations with well-established development programs can work well for this project, small community churches generally do not have a broad enough development program to give you adequate information for your course work. If you are having difficulty identifying a project organization, you should contact me immediately to discuss how to find one. If you have not secured a project organization by the middle of the first week of class, it will be difficult for you to succeed in the class.

Assignments

Assignments must be posted in the appropriate area of the course site on the date they are due. There may be penalties for late assignments. If you anticipate difficulties in meeting a deadline, contact me well in advance of missing the deadline.

Because the course is conducted online and is available 24 hours a day, 7 days a week, it is expected that course activities can be completed on time regardless of travel and work schedules.

This is a graduate-level course, and students are expected to submit assignments that are professional and commensurate with graduate level study. Assignments will be evaluated both on content and presentation. Spelling, grammar and proofreading matter.

Several of the assignments require you to create and submit written documents. Please submit all documents in docx or pdf form. I cannot guarantee that I can open documents from your word processing program; submitting your documents in either docx or pdf form ensures that I can assess your work with no delays. (If you do not already have a favored method for creating pdf's, go to primopdf.com and download the free Primo PDF program. It is very easy to install and use.) If you anticipate any difficulties with submitting your assignments, contact me to discuss.

Course Teaching and Learning Methods

This course is taught in an intensive format, and it is 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 instructor 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.

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. Even with this approval, late assignments will automatically be lowered by one-third of the available points for that assignment.
2. Some assignments will 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 Blackboard*).
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.
3. The course facilitator will read and critically assess students’ assignments and provide feedback within the following course week. Any exceptions to this practice will be communicated to the students.
4. The course facilitator will respond to all student e-mails within 24 hours of receipt (unless traveling).
5. The course facilitator will respond to all student phone calls within 24 hours (unless traveling).

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 instructor. 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 boards, both original posts and responses to other students' posts. Rubrics for these posts will be linked to each assignment. In general, 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.

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:

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.

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.***

Grading

Each assignment will have an assigned number of points, and a rubric posted on the site to indicate grading criteria. A chart is available on the course site that shows the available points for each assignment, and how your points translate to your final grade. The Moodle grading area allows you to track your progress throughout the term.

Course Content:

Regarding assignments, please note that summary information on each assignment is included in this syllabus and significant additional information about each assignment is available on the course website. Do not assume that you are fully prepared to complete the assignment only by reading the information in the syllabus.

Week One: Preparing for the Campaign

Topics

- Introductions and course expectations
- History, role and purpose of campaigns
- Core campaign components
- Campaign preparation
- Campaign planning

Readings

- Dove
Main text, Chapters 1, 2 & 15
Resources A, B & C
- Kihlstedt, Chapters 1, 3 & 5

Assignments

Introduce yourself in the Introductions forum. Tell us your name, where you live, where you work, and what organization you will be using for your class project. Respond to at least two of your fellow students' posts.

Participate in the Week 1 Forum on the topics from the readings.

Sign onto the Confidentiality Pact Wiki and add your commitment during the first week.

Use the Dove's Development Program Assessment tool (pp. 29-31) and Preparedness Index (pp. 33-34) to assess your own organization. Submit both your Program Assessment and your Preparedness Index.

Week Two: Leadership, Internal and External

Topics

- Defining the roles of staff and volunteer leadership in the campaign
- Recruiting, educating and motivating volunteers
- Dealing with problematic volunteer situations

Readings

- Dove
Main text, Chapters 3 & 4
Resource D
- Kihlstedt, Chapter 2 & pp 95-118

Assignment

Assess your project organization's campaign or general development volunteer structure, and identify leadership positions (both in the volunteer structure and in the organization's staff

structure) that would be critical to the success of a campaign. Propose how these leaders should be involved in the campaign. Post your assignment in the discussion forum. Respond to at least one other student's post by suggesting additional tactics to expand upon his or her proposal.

Week Three: Case for Support; Setting Goals; Gift Table

Topics

- Understanding campaign case statements
- Developing your campaign messages and articulating them concisely
- Determining needs and priorities, and setting goals and naming levels
- Understanding, constructing and using a major gifts table

Readings

- Dove
Main text, Chapters 5, 6 & 13
Resources E, F & G
- Kihlstedt, pp. 259-269; Chapter 9

Assignments

Assess your organization's messages and case for support. Develop a case for support for your organization's campaign, or critique the existing case (if there is one) and propose how to improve it. Post your case on the discussion forum. Offer feedback on your classmates' postings.

Goals and Gift Table: Determine your organization's intended goal, or propose one. Construct two gift tables – a standard one using Dove's traditional formula; and a second one that is tailored to your organization's particular circumstances. If the traditional formula works well for your organization, submit a paragraph explaining why, in lieu of the second gift table.

Week Four: Special Campaign Components: Events, Communications and Annual Giving

Topics

- Incorporating various types of events into your campaign
- Developing a communications plan
- Integrating the Annual Fund into a campaign

Readings

- Dove

Main text, Chapter 13

Resources J, L & M

- Kihlstedt, pp 259-271, 289-308 & Chapter 9

Assignments

Identify the types of events that should be used in your organization's campaign. Indicate the key strategy for each event, and when it should be incorporated into the overall campaign timeline.

Propose the main communications vehicles your organization should use in its campaign. Identify the strategy for each vehicle, the frequency, the nature of the vehicle, and the audience.

Participate in the discussion forum on Annual Giving.

Participate in the discussion forum: Ask the Experts.

Week Five: The Donors

Topics

- Identifying, cultivating and soliciting major gift prospects for campaign gifts
- Securing lead gifts to the campaign
- Engaging donors throughout the process, from pre-campaign planning through the post-campaign period

Readings

- Dove
Main text, Chapters 8, 9 & 10
- Kihlstedt, Chapters 6 & 7, pp 271-289

Assignments

Interview a development officer within your project organization about the organization's prospect development programs and their relationships with their top prospects. Write a 1-2 page assessment of your organization's prospect identification, screening and research program, its methods for developing initial relationships with potential donors, and its relationships with its potential lead campaign donors. Based on what you've learned, provide your judgment about the organization's likelihood of success with its largest prospects, and propose any opportunities you can identify that would improve the chances of success.

Review the donor profile on the course site. Post a forum entry proposing a solicitation strategy that the organization might use to secure a major campaign gift from the donor. Make your post, then return to the forum to participate in discussion of the various strategies proposed.

Week Six: Ongoing Campaign Operations

Topics

- Managing the logistics and day to day operations of the campaign
- Campaign timelines
- Challenge Grants
- Counting and Reporting

Readings

- Dove
Main text, Chapters 11 &12
Resources I &K

Assignments

Comment on two of the forum questions, using what you've learned from the class in the context of your project organization, and reply to two of your classmates' posts.

Week Seven: Concluding the Campaign and Beyond

Topics

- Stalled Campaigns
- Stewardship
- Celebrating Success
- Post-Campaign Planning

Readings

- Dove
Main text, Chapter 14 & 15
Resources O & P
- Kihlstedt, Chapter 10 & 11

Assignment

Write a report assessing the readiness of the Project Organization to conduct a successful campaign. Use the prior class assignments as appropriate, supplementing with additional materials to address all of the areas discussed during class. Be specific, and include references and examples from the materials covered throughout the course. This should be viewed as similar to a report one might receive from a campaign consultant after their review of the organization's materials to assess the readiness to begin.