

School of Business and Nonprofit Management

Course Syllabus

Course: *SBNM 5771-B3 – Annual and Major Gift Fundraising for Nonprofit Organizations*

Academic Year: 2013/14 **Semester/Quad:** *Fall B*

Credit Hours: 2

Prerequisites: None

Instructor: *Alexander “Sandy” Macnab, M.Ed., FAHP, CFRE*

President, Alexander Macnab & Co.

<http://www.AlexanderMacnab.com>

Phone: 312-642-1239 (my office – messages will get to me 24/7) 312-560-1420 (cell)
773-244-6270 (General SBNM Office Number)

Email: agmacnab@northpark.edu

Availability:

I can meet before or after class by appointment. Please contact me via email and I'll respond within 24 hours during the week and within 48 hours on weekends. Phone conversations can be held by emailing to request times.

Course Description:

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 securing charitable gifts from individuals, the programs used to do so, how to steward donor relationships, and future trends that will impact fundraising.

Introductory Comments:

Nonprofit organizations require resources to successfully fulfill their mission. In a time of decreased external funding, increased expectations of accountability on the part of nonprofits, and the recent economic downturn that negatively affected individuals and funding entities, nonprofit organizations must work harder to raise the funds needed. 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 course will provide you with the tools to understand, analyze, and implement an annual and major gift fund 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 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 do not have access to an organization, please contact Mr. Macnab immediately

Course Materials:**REQUIRED**

Textbook:

Temple, Eugene R., Seiler, Timothy L., and Aldrich, Eva E. (eds.) 2011. *Achieving Excellence in Fundraising*. 3rd Edition. Hoboken, NJ: John Wiley & Sons, Inc. ISBN-10: 978-0407055173-8

Some additional readings that will be accessed through Moodle.

OPTIONAL

Textbook(s):

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

Greenfield, James M. (2002). *Fundraising Fundamentals: A Guide to Annual Giving for Professionals and Volunteers (2nd ed.)*. Hoboken, NJ: John Wiley & Sons, Inc. ISBN 978-0-471-20987-4

Panas, Jerold. (2012). *Mega Gifts: Who Gives Them, Who Gets Them*. 2nd Edition. Medfield, MA: Emerson & Church Publishers. ISBN 1-889102-24-5

Panas, Jerold. (2006). *Asking: A 59-Minute Guide to Everything Board Members, Volunteers, and Staff Must Know to Secure a Gift*. Medfield, MA: Emerson & Church Publishers. ISBN 1-889102-17-2

Publication Manual of the American Psychological Association (2010) 6th Edition. Washington, D.C.: American Psychological Association. ISBN 1-4338-0561-8

Essential IDEA Objectives:

1. Gaining factual knowledge (terminology, classifications, methods, trends).
2. Learning fundamental principles, generalizations, or theories.
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.

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

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 class, students are encouraged to engage in dialogue to share experiences and ideas. The course will use a variety of methods. These include class discussion, self-directed reading, and learning-by doing with interaction with a nonprofit organization chosen by the student.

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.

Technical Skills Required:

Ability to use a computer, internet access, and general office programs such as Microsoft Word.

Schedule of Weekly Assignments:

Week	Dates	Topics	Assignments
1	10/23	Course Basics, Introductions Mission and Case for Support Annual vs. Major Gifts The Fundraising Cycle	<p><u>Read:</u></p> <ol style="list-style-type: none"> 1. Temple: Chapters 1-4, 35 (skim) 2. http://newsroom.bankofamerica.com/press-release/global-wealth-and-investment-management/2012-bank-america-study-high-net-worth-philant Follow the link, but look for new 2013 study which will become available during this class. <p>Optional: Dove: Intro, Chapter 1, Resource 23 Panas (asking): Page 108 Greenfield: Chapter 1</p> <p><u>Assignments:</u> Find a Nonprofit Organization for Coursework Begin Collecting Direct Mail Examples for Use in Week 3 Read and Sign the Confidentiality Pact Develop/Critique a Mission and Case Statement</p>
2	10/30	Annual Giving Program - Part 1 <ul style="list-style-type: none"> • Budgeting • Annual Fund Brand • Events • Text-to-Give 	<p><u>Readings:</u> Temple: Chapters 5, 6, 21, 34 Daniel: A Realistic Look at Annual Funds (in Moodle) Crain's Articles: Chicago Special Events (in Moodle)</p> <p>Optional: Dove: Chapters 2-4, 6, Resources 1, 2, 11, 19, 20</p> <p><u>Assignment Due:</u> Mission & Case Statement</p> <p><u>Next Week:</u> Bring Direct Mail Examples, Event Timeline/Analysis</p>

Schedule of Weekly Assignments (continued):

Week	Dates	Topics	Assignments
3	11/6	<p>Annual Giving Program - Part 2</p> <ul style="list-style-type: none"> • Direct Mail – In class: compare and assess examples • Phonathon • Online Giving/Social Media 	<p><u>Readings:</u> Temple: Chapters 19, 20, 22, 26 Readings/Links in Moodle Optional: Dove: Chapters 5, 7, Resources 8, 12-16, 18 Greenfield: Chapter 2,3, 4 <u>Assignment Due:</u> Event Timeline/Analysis <u>Next Week:</u> Annual Fund Analysis, Website Review</p>
4	11/13	<p>Major Gifts – Part 1</p> <ul style="list-style-type: none"> • Elevator Pitch • Prospect ID & Research • Prospect Qualification • Donor Cultivation and Motivation • Written Proposals 	<p><u>Read:</u> Temple: Chapters 7, 10, 11, 15, 25 Readings/Llinks in Moodle Optional: Dove: Chapter 11, Resources 21, 25, 26 Panas (asking): Chapters 1-9 Panas (mega gifts): Chapters 2-5 <u>Assignment Due:</u> Annual Fund Analysis <u>Next Week:</u> Major Gift Proposal</p>
5	11/20	<p>Major Gifts – Part 2</p> <ul style="list-style-type: none"> • In-person Solicitation • Stewardship • Gift Acceptance Policy • Types of Gifts 	<p><u>Read:</u> Temple: Chapters 7, 11, 15, 25 Readings/Links in Moodle Optional: Dove: Chapters 8, 9 Panas (Asking:) Chapter10-End of Book <u>Assignment Due:</u> Major Gift Proposal <u>Next Week:</u> Major Gift Program Analysis</p>
6	12/4	<p>Comprehensive Fundraising</p> <ul style="list-style-type: none"> • Organizational Cycle • Communications • Reporting • Integrating Annual and Major Giving 	<p><u>Read:</u> Temple: Chapters 27, 28, 30 – 32 Readings/links in Moodle Optional: Dove: Chapter 11 Panas (Mega Gifts): Chapter 9, 15 <u>Assignment Due:</u> Major Gift Program Analysis <u>Next Week:</u> In-class Presentation of Your Program Analysis</p>

Schedule of Weekly Assignments (continued):

Week	Dates	Topics	Assignments
7	12/11	Integrating Components, Planning, Evaluating, Future Trends	<p><u>Readings:</u> Temple: Chapters 14, 16, 17 Readings/links posted in Moodle Optional: Temple: 34, if applicable – grassroots organizations Dove: Chapter 12, Resources 27, 28 Greenfield: Chapter 13</p> <p><u>Assignment Due:</u> Final Project Presentation</p> <p><u>Next week:</u> Final Paper Due on December 12</p>
	12/12	Final Paper - No Class	Due by 5 PM Central Time, emailed to Mr. Macnab at agmacnab@northpark.edu

Grading:

Assignment	Due Date	Points	% Grade
#1) Mission & Case Statement Analysis	10/30/13	40	13%
#2) Events Analysis	11/06/13	30	10%
#3) Annual Fund Analysis	11/13/13	40	13%
#4) Written MG Proposal	11/20/13	30	10%
#5) Major Gifts Analysis	12/04/13	40	13%
#6) Final Presentation	12/11/13	30	10%
#7) Final Paper	12/12/13	55	19%
#8) Participation	ongoing	35	12%
Total:		300	100%

Grade Mapping:

Numeric Grade	Letter Grade	Numeric Grade	Letter Grade	Numeric Grade	Letter Grade
285-300	A (95-100%)	240-248	B- (80-82%)	209 and below	F (<70%)
270-284	A- (90-94%)	231-239	C+ (77-79%)		
261-269	B+ (87-89%)	219-230	C (73-76%)		
249-260	B (83-86%)	210-218	C- (70-72%)		

Assignment Grading Policies:

A grading rubric is provided for each graded assignment throughout the course. This is a graduate level course, so standards are high. Grammar and spelling matter, and your assignments will be graded down if you are not careful about proofreading. Spellcheck is a wonderful tool, but it is not enough. Planning a little extra time for each assignment so that you can proofread your finished version carefully can make a difference in your grade.

Late assignments will be graded, but a 25% penalty will be assessed for each 24 hour period beyond the assigned due date. If you think you will miss a deadline, let me know as far in advance as possible so that we can attempt to work out an alternate arrangement. If I don't hear from you before an assignment is due, I will not consider alternate arrangements. The final project for the class cannot be accepted late.

Student Responsibilities:

As a student participant in this course, you are responsible for keeping up with assignments and due dates, items outlined in this syllabus and taking responsibility for your requirements. If you have a question at any time or concerns, please email or call me as soon as possible. I expect to have communication from you if there is an issue or emergency.

Instructor Responsibilities:

Throughout this course, you can expect that I will provide attention to your questions and comments and give care toward grading your assignments, considering the time you will be putting into them. Expect me to be available via email and phone, spending time weekly giving my feedback on each homework assignment and class participation.

ASSIGNMENT SPECIFICATIONS

Overview:

Assignments and the classroom discussion are designed to provide opportunities for learning and growth. They are intended to be hands-on with the nonprofit of your choice while the classroom discussion will provide an opportunity for you to not only discuss what you have learned and read but provide opportunity to learn from others. Assignments for the week are due at the beginning of each class.

All assignments must follow APA standards as mentioned in the College policies at the end of this document. There are resources available for understanding APA standards if you are not familiar. If you have any questions or concerns, please contact me as soon as possible.

Choosing and working with a nonprofit organization for this course: Each student must identify a nonprofit organization to work with prior to the first meeting of the class. Students typically use organizations for which they work or volunteer, but it could also be a completely new organization. Here are a few suggestions as you settle on your study organization:

- Try not to use a church, unless it is a mega-church with a professional fundraiser. Fundraising at small churches does not usually provide a complex enough setting for study.
- Make sure the organization has at least one full-time fundraising (development office) staff person so that there is something to study. If you choose an organization with no fundraising program at all, your assignments will be more difficult.

Overview Continued:

If you are approaching an organization where you have no established connections, consider asking for a few (three) interviews with the chief development officer (usually the Director of Development), rather than asking for a full study experience. You should be able to combine the questions from multiple assignments so that you need only connect with your contact person a few times during the 7 weeks.

If you are getting stuck, let me know right away and I'll see what North Park University contacts we can use to help.

If you find yourself having difficulty getting the information you need from your organization during the course, contact me right away and I'll help you figure out how to work around the problem.

ASSIGNMENT #1: Mission and Case for Support

Assignment Specifications:

Applying what you have learned in readings and discussion:

1. Submit the organization's mission statement and provide a one-paragraph analysis of its effectiveness, given your current knowledge of the organization. If the organization does not have a mission statement, draft one for them. (10 points)

To consider: Does it address the necessary elements of a mission statement? What is the statement missing? Does it need all of the elements to be effective? Why it is inspiring?

2. Revise or draft a case for support, and provide an analysis (750 words) (30 points) Note: Clearly indicate if you are completing part a, or part b.

a. If the organization has a case for support, review and revise it:

- • Submit the original case for support.
- • Review and critique the case for support; what is effective and what is not?
- • Create a 2-page revision of the case for support and submit the revision

b. If the organization does not have a case for support:

- • Write a case for support
- • Assess your case for support; what is effective and why?

Due at the beginning of class.

Criteria	10 points - Exceeds Standards	7 points - Meets Standards	3 points - Below Standards
Mission - Critique Content	Original mission is shown and a thoughtful analysis of its content is provided, citing lecture and readings.	Original mission is shown and analysis of its content is provided.	Content provided is not complete.
Mission - Critique Quality of Writing	Organized, concise, clearly written in understandable language. Free of typos and grammatical errors.	Writing is adequate and fairly well organized. One or two typos or grammatical errors may be present.	Writing is poor, unclear, and disorganized. There are multiple typos or grammatical errors.

ASSIGNMENT #1: Mission and Case for Support (continued)

Criteria	<i>10 points - Exceeds Standards</i>	<i>7 points - Meets Standards</i>	<i>3 points - Below Standards</i>
Mission – Critique Principles of Mission	All the principles covered in this week's resources are included.	Most of the principles covered in this week's resources are included.	Few of the principles covered in this week's resources are included.
Mission – Proposed Content	A clear and relevant mission for the organization is proposed and very well-explained.	A mission for the organization is proposed and explained.	A fuzzy or unclear mission for the organization is proposed and not well-explained.
Mission – Proposed Quality of Writing	Organized, concise, clearly written in understandable language. Free of typos and grammatical errors.	Organized, concise, written in mostly understandable language. Mostly free of typos or grammatical errors.	Writing is poor, unclear, and disorganized. There are multiple typos or grammatical errors.
Mission – Proposed Principles of Mission	All the principles covered in this week's resources are included.	Most of the principles covered in this week's resources are included.	Fewer than three of the principles covered in this week's resources are included.
Criteria	<i>30 points - Exceeds Standards</i>	<i>20 points - Meets Standards</i>	<i>10 points - Below Standards</i>
Case – Critique Content	A case for support is presented; the key components are thoughtfully analyzed. Recommendations are made for areas that can be improved. Areas that are strong are identified	The case is presented with some analysis and consideration of areas that could be improved. Elements that are strong in the case are discussed.	The case is presented, but there is little or no analysis of its strengths and weaknesses.
Case – Critique Quality of Writing	The case is presented with extensive analysis and consideration of areas that could be improved. Elements that are strong in the case are discussed.	The case is presented with some analysis and consideration of areas that could be improved. Elements that are strong in the case are discussed.	The case is presented, but there is little or no analysis of its strengths and weaknesses.
Case – Critique Principles of Case	All the principles covered in this week's resources are included.	Some of the principles are included.	Few of the principles are included.

ASSIGNMENT #1: Mission and Case for Support (continued)

Criteria	30 points - Exceeds Standards	20 points - Meets Standards	10 points - Below Standards
Case – Proposed Content	A comprehensive case is presented, including all the main elements covered in the reading. The case is clear and inspires support.	The case is presented which includes the majority of elements from the reading. The case is clear and compelling.	The case presented is not complete or compelling.
Case – Proposed Quality of Writing	Organized, concise, clearly written in understandable language. Free of typos and grammatical errors.	Writing is adequate and fairly well organized. One or two typos or grammatical errors may be present.	Writing is poor, unclear, and disorganized. There are multiple typos or grammatical errors
Case – Proposed Principles of Case	All the principles covered in this week's resources are included.	Some of the principles are included.	Few of the principles are included.

ASSIGNMENT: Confidentiality Pact**Assignment Specifications:**

Several of the assignments in this course involve students sharing information about their organizations' programs. The best learning occurs when students feel comfortable being fully candid about their organizations' strengths and opportunities for growth. Sometimes the information shared is sensitive. By signing onto this pact, each of us asserts that we will:

- 1) respect the confidentiality of all information shared in this course, both on this site and in conversation with other participants;
- 2) not divulge any information about organizations shared during this course with anyone outside of this course;
- 3) agree to be held to this pact as a component of North Park University's expectations for students as reflected in the official catalog;
- 4) agree that violating this pact is cheating, and will be subject to the consequences referenced in the official catalog.

To signify your agreement, please add your name into the Confidentiality Pact. You can access it by clicking on the Confidentiality Pact link in Moodle. Add your commitment by **October 30**.

While there are no points assigned to this, it is a required component for this course.

ASSIGNMENT #2 Event Timeline & Analysis

Assignment Specifications:

Events can be an important tool for nonprofits to attract new donors and raise funds. Successful events have clear objectives and require thorough planning and follow up. This week you will create a timeline for a signature event your organization holds or that you are proposing they hold (please indicate which in your paper).

Provide the following information as context for your timeline:

- Organization name and mission
- Event goal(s)
- Intended audience
- Measures of success
- How the event connects to overall fundraising goals

Make sure your timeline includes any follow-up that will occur after the event.

Minimum 2 pages, limit 4 pages, due November 6.

Criteria	<i>20 points - Exceeds Standards</i>	<i>16 points - Meets Standards</i>	<i>10 points - Below Standards</i>
Content	Event context is provided. Timeline includes every key decision in an event with a specific date, including follow-up after the event. Goals of the event are clearly defined as is the way in which achievement of goals will be measured.	Timeline includes most key decisions in event planning and some follow-up. Event goals are articulated with some measures outlined. Some organizational context is provided.	The timeline lacks specificity and/or is incomplete. Goals are not clear and measures of success are lacking.
Principles of Events	All the elements of a comprehensive event timeline are identified and discussed. Event goals are clear.	The majority of the elements of a comprehensive annual campaign are identified and discussed. Event goals are mentioned.	Few of the principles are included; no clear goals for the event are mentioned.
Criteria	<i>10 points - Exceeds Standards</i>	<i>7 points - Meets Standards</i>	<i>3 points - Below Standards</i>
Quality of Writing	Organized, concise, clearly written in understandable language. Free of typos and grammatical errors.	Writing is adequate and well organized. Document has been checked for spelling and grammatical errors.	Writing is poor, unclear, and disorganized. There are multiple typos or grammatical errors.

ASSIGNMENT #3: Fundraising Analysis

Assignment Specifications:

Summarize the organization's annual and major gifts fundraising strategy for two years – the current and previous fiscal year. (Limit 6 pages, 40 pts) **Due November 13.**

Research the organization's fundraising practices for the past two years, or for the current year and the immediate past year. Utilize three or more sources of information, including at least one interview with a staff or board member, and cite your sources.

- a. Identify total revenue and expenses for each year using a chart/excel sheet.
 - Who donates to the organization? Identify fundraising revenue, using the following categories: dollars, and percentage of total; amount raised from individuals/families, foundations, corporations, government, and any other categories important to this organization.
 - What does the organization spend on fundraising? Identify fundraising expenses for each year and categorize using dollars and percentages.
- b. Define this organization's "annual fund." Each organization will have a different definition of which gifts are relied upon annually for support. If the organization does not have a definition, propose your definition for a realistic annual fund. Additionally:
 - How much revenue is raised from this organization's annual fund?
 - How many donors and/or gifts contribute to the annual fund for both years?
- c. Describe the major gifts program, including whether or not the organization has a major gifts program. Additionally:
 - What is the definition of a major gift for this organization? If the organization does not have a definition, propose your definition for a major gift.
 - How much revenue is raised from major gifts? How many major donors contributed for both years?
- d. Identify at least 5 solicitation techniques (e.g. direct mail, phone, in-person, events, etc.) which have been used in these two years to raise annual OR major gifts. If less than five techniques are used, list at least five and describe why they are not being used. Be sure to indicate which techniques are used for annual fund gifts and which are used for major gifts. Answer the following questions about each of the 5 techniques used:
 - How much was raised (revenue) by this solicitation method? How much was spent (expenses), if known?
 - How many donors gave in response to the solicitation?
 - Did the solicitation method provide a non-monetary benefit?
 - In your opinion, was the solicitation effective?

ASSIGNMENT #3: Fundraising Analysis (continued)

Criteria	<i>30 points - Exceeds Standards</i>	<i>24 points - Meets Standards</i>	<i>18 points - Below Standards</i>
Content	Provides a comprehensive and detailed analysis of the organization's current fundraising strategies using principles covered in the readings. Identifies areas for improvement and makes concrete suggestions.	Organization's fundraising strategies are reviewed and analyzed. Some suggestions for improvement are made.	The review of organization's fundraising strategies is not comprehensive and there is no element of analysis. No areas for improvement are identified.
Principles of Annual Fundraising	All the elements of a comprehensive annual campaign and major gifts program are identified, analyzed, and discussed.	The majority of the elements of a comprehensive annual campaign and major gifts program are identified, analyzed, and discussed.	Few of the principles are included.
Criteria	<i>10 points - Exceeds Standards</i>	<i>8 points - Meets Standards</i>	<i>6 points - Below Standards</i>
Quality of Writing	Organized, concise, clearly written in understandable language. Free of typos and grammatical errors.	Writing is adequate and well organized. Document has been checked for spelling and grammatical errors.	Writing is poor, unclear, and disorganized. There are multiple typos or grammatical errors.

ASSIGNMENT In Class Direct Mail Review

Assignment Specifications:

Direct mail is a foundational tool for most annual funds. Using the examples you have brought to class, in small groups assess its effectiveness using the principles outlined in the reading. Highlight what you find compelling about the piece and what could be improved.

This will be an in-class discussion. Follow the rubric for the appropriateness of your analysis for full class participation credit.

Criteria	<i>Exceeds Standards</i>	<i>Meets Standards</i>	<i>Below Standards</i>
Assessment	Assesses direct mail on all principles covered in course materials; identifies at least one area for improvement.	Some principles are addressed, but connection to the course material could be stronger.	Shows little evidence that the participant understands the key points.
Proposals	Proposed plan for improvement includes specific action steps and shows ability to apply principles.	Plans and recommendations are general and not clearly connected to course material.	Shows no evidence participant understands the key points.

ASSIGNMENT In Class Direct Mail Review (continued)

Criteria	<i>Exceeds Standards</i>	<i>Meets Standards</i>	<i>Below Standards</i>
Quality of Speaking	Organized, concise, described in understandable language. Free of grammatical errors.	Speaking is adequate, well-organized and free of grammatical errors.	Speaking is poor, unclear, and disorganized. There are multiple grammatical errors.

ASSIGNMENT #4 Major Gift Proposal

Assignment Specifications:

Draft a 2-page proposal for funding to an individual prospect (30 points)

- Draft a personalized proposal to a prospective major gift donor. Select a prospect who is involved with your organization, preferably through annual gifts. (Change names for confidentiality.)
- Outline a specific case for support, identifying the project or mission the major gift would support, and the dollar amount you are requesting.
- Do not include a cover letter, but assume that one would accompany an actual proposal if it were being mailed.
- Incorporate the elements from your organization’s case for support that you think are relevant.
- This proposal could be one you would use in a face-to-face solicitation.

Due November 20

Criteria	<i>20 points - Exceeds Standards</i>	<i>16 points - Meets Standards</i>	<i>10 points - Below Standards</i>
Proposal	Proposal is personalized to donor and compelling. Relevant portions of the case statement are included. Asks for a specific dollar amount and outlines how the contributed funds will be used.	Proposal is personalized and interesting to read. Organization's mission and case statement are included or referenced. Includes specific ask and explanation of how funds will be used.	Proposal is not compelling and it is unclear how it relates to the case statement of the organization. Does not include a specific ask.
Fundraising Principles	Ties in and builds upon mission/case of organization; includes appropriate donor recognition; outlines terms of pledge (if applicable).	Mentions mission/case; includes donor recognition; includes appropriate donor recognition; outlines terms of pledge (if applicable).	Does not include mission/case; fails to mention donor recognition or terms of pledge.

ASSIGNMENT #4 Major Gift Proposal (continued)

Criteria	<i>10 points - Exceeds Standards</i>	<i>8 points - Meets Standards</i>	<i>3 points - Below Standards</i>
Quality of Writing	Organized, concise, clearly written in understandable language. Free of typos and grammatical errors.	Writing is adequate and well organized. Document has been checked for spelling and grammatical errors.	Writing is poor, unclear, and disorganized. There are multiple typos or grammatical errors.

ASSIGNMENT #5: Major Gifts Analysis

Assignment Specifications:

Study and assess the organization’s major gift fundraising practices for the past two years, or for the current year and the immediate past year. Use three or more sources of information, including at least one interview with a staff or board member, and cite your sources. (No more than 6 pages, 40 points.)

- a. Define this organization’s major gift program. Each organization will have a different definition of which gifts are considered "major" gifts. If the organization does not have a definition, propose your definition for a major gift. Additionally:
 - How much revenue is raised from this organization’s major gift program?
 - How many donors and/or gifts contribute to the major gift program for both years?
- b. Identify at least 2 solicitation techniques (e.g. in-person, events, volunteer solicitations, etc.) that have been used in these two years to raise major gifts. If less than two techniques are used, list at least two and describe why they are not being used. Answer the following questions about each of the 2 techniques used:
 - How much was raised (revenue) by this solicitation method? How much was spent (expenses), if known?
 - How many donors gave in response to the solicitation?
 - Did the solicitation method provide a non-monetary benefit?
 - In your opinion, was the solicitation effective?
- c. Identify one major gift prospect for your organization:
 - Provide necessary context/background about the prospect's relationship with your organization
 - Recommend a suggested gift range
 - Suggest a “moves” plan to engage and cultivate the prospect

Due 12/4

Criteria	<i>30 points - Exceeds Standards</i>	<i>16 points - Meets Standards</i>	<i>10 points - Below Standards</i>
Content	Provides a comprehensive and detailed analysis of the organization’s current major gift fundraising strategies using principles covered in the reading. Identifies areas for improvement and makes concrete suggestions.	Organization’s major gift strategies are reviewed and analyzed. Some suggestions for improvement are made and the readings are explicitly referenced.	The review is not comprehensive and there is little element of analysis. Few areas are identified for improvement and there is no reference to the readings.

ASSIGNMENT #5: Major Gifts Analysis (continued)

Major Gift Fundraising Principles	All the elements of a comprehensive major gift program are identified, discussed and analyzed.	The majority of the elements of a comprehensive program are identified, discussed and analyzed.	Few elements of a comprehensive major gift program are included.
Criteria	<i>10 points - Exceeds Standards</i>	<i>8 points - Meets Standards</i>	<i>3 points - Below Standards</i>
Quality of Writing	Organized, concise, clearly written in understandable language. Free of typos and grammatical errors. Follows APA standards	Writing is adequate and well organized. Document has been checked for spelling and grammatical errors. Follows APA standards.	Writing is poor, unclear, and disorganized. There are multiple typos or grammatical errors. Does not follow APA standards.

ASSIGNMENT #6: ORAL OVERVIEW OF YOUR ORGANIZATIONAL PLAN

<p>Assignment Specifications:</p> <p>Prepare a 10 minute presentation to share the findings and recommendations of your fundraising analysis. Prepare the presentation as though you are a consultant making recommendations to a board of trustees or a staff member presenting to your department/organization’s executive leadership. This is an executive summary or overview of your final paper. (30 points.)</p> <ul style="list-style-type: none"> • Use effective and compelling visual aids • Focus on major findings and recommendations, providing concrete suggestions and examples. • Identify clear next steps the organization should take to begin implementing your recommendations. • Highlight areas in which the organization's practices are effective. <p>Due in class December 11</p>			
Criteria	<i>20 points - Exceeds Standards</i>	<i>16 points - Meets Standards</i>	<i>10 points - Below Standards</i>
Proposal	Overview is compelling with visuals and references. Relevant portions of the case statement are included. Based on the presentation, listeners will want to read the full report.	Overview is interesting to hear. The organization's mission and case statement are referenced. Includes specific suggestions for improvement.	Overview wanders, is not compelling and it is unclear how it relates to the organization’s case and does not include ways to improve.
Fundraising Principles	Ties in and builds upon mission/case of organization; includes doable, relevant improvement suggestions.	Mentions mission/case; includes donor recognition; includes appropriate improvement suggestions.	Does not include mission/case; fails to mention specific fundraising techniques or plans.
Criteria	<i>10 points - Exceeds Standards</i>	<i>8 points - Meets Standards</i>	<i>3 points - Below Standards</i>
Quality of Speaking	Organized, concise, using compelling understandable language. Free of grammatical errors.	Speaking is adequate and well organized and mostly free of grammatical errors.	Speaking is unclear, and disorganized. There are multiple grammatical errors.

ASSIGNMENT #7 Final Paper

Assignment Specifications:

Prepare a plan for your organization’s combined annual and major gift fundraising programs. Assess current performance and devise recommendations for improvement. Integrate as many of the concepts covered in the course material as you can.

You should approach your final paper as if you were preparing a plan to submit to the executive director and/or board of the organization you have been studying. If you are not an employee of the organization, prepare the paper as if you were an outside consultant advising the organization.

The paper should be presented as a practical plan the organization could follow either to create a new annual giving and major gifts program, or to improve and enhance the one it already has. It should include critiques and recommendations for improvement of all components that already exist, and proposals for additions of programs that do not exist.

The paper must fully address both the annual giving program and the major gifts program. If your organization has one program but not the other, it is fine to present the existing program in the “critique and recommend improvements” mode and the other in the “propose a new program” mode. If you leave out one of the programs because it doesn’t exist at all, your grade will suffer by 50%.

It is fine (and even recommended) to use the assignments that you have done earlier in the class in your final project. However, be sure to incorporate any feedback you have been given on the earlier assignments. If you merely copy and paste an earlier assignment into the final paper without making any updates, and the earlier assignment did not receive full points, you will lose points on the final paper as well.

The best papers are specific and thorough, and include all the components noted in the samples in Moodle. I won’t critique your paper before your final submission – that wouldn’t be fair to the other students, but if you have specific questions about whether or how to address something in the paper, feel free to contact me and I will try to help you work through it.

Submit your paper via email to Mr. Macnab at agmacnab@northpark.edu by 5 PM Central Time on **December 12, 2013**. Late submissions will not be accepted.

Criteria	<i>40 points - Exceeds Standards</i>	<i>30 points - Meets Standards</i>	<i>15 points - Below Standards</i>
Assessment	Program assessment shows good analytical approach; analysis is based on principles provided in course materials.	Program is described, but analysis is not applied in a thorough manner.	Little or no assessment is provided.
Plan	Plan is thorough, addresses both annual and major gifts, and includes specific action items.	Plan is fairly complete, but may be missing one or two items. Suggestions are general.	Plan is minimal and inadequate.
Proposals	Proposed improvements are linked to assessment and show ability to apply course principles.	Recommendations are general and not clearly connected to course materials.	Shows no evidence participant understands the key points.

ASSIGNMENT #7 Final Paper (continued)

Criteria	15 points - Exceeds Standards	10 points - Meets Standards	5 points - Below Standards
Quality of Writing	Organized, concise, clearly written in understandable language. Free of typos and grammatical errors.	Writing is adequate and well organized. Document has been checked for spelling and grammatical errors.	Writing is poor, unclear, and disorganized. There are multiple typos or grammatical errors.

POLICY STATEMENTS

Confidentiality:

As mentioned earlier in this Syllabus, 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 instructor 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 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).

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/Campus-Life-and-Services/Disability-Resources>