

PSC 550: PHILANTHROPY AND RESOURCE DEVELOPMENT  
Spring 2008

**Instructor:**

Paul J. Russ, CFRE, Director of Resource Development  
Hospice and Palliative Care of Greensboro  
Email: [pruss@hospicegso.org](mailto:pruss@hospicegso.org)  
Office Direct: 336-478-2502  
Home: 336-908-5577

**Text:**

Kline, Kim. *Fundraising for Social Change*. San Francisco, CA: Jossey-Bass, 2001

In addition, there will be required readings from a variety of sources. These readings and the classes they are to be read for will be posted on "Blackboard" and/or placed on reserve reading at Jackson Library. Readings will come from the following resources:

Barrett, Richard D. and Molly E. Ware. *Planned Giving Essentials: A Step by Step Guide to Success*. Gaithersburg, MD: Aspen Publishers, 1997.

Broce, Thomas E. *Fund Raising: The Guide to Raising Money from Private Sources*. Norman, OK: University of Oklahoma Press, 1986.

Burk, Penelope. *Donor Centered Fundraising*. Chicago, IL: Cygnus Applied Research, Inc., 2003

Ciconte, Barbara Kushner and Jeanne G. Jacob. *Fund Raising Basics: A Complete Guide*. Gaithersburg, MD: Aspen Publishers, Inc., 2nd edition, 2001.

Greenfield, James M. *The Nonprofit Handbook: Fundraising*. New York, NY: John Wiley and Sons, Inc., 3<sup>rd</sup>, 2001.

Joyaux, Simone P. *Strategic Fund Development*. Gaithersburg, MD: Aspen Publishers, 1997.

Levy, Barbara R. and Barbara H. Marion. *Successful Special Events: Planning, Hosting and Evaluating*. Gaithersburg, MD: Aspen Publishers, 1997.

Scanlan, Eugene A. *Corporate and Foundation Fund Raising: A Complete Guide from the Inside*. Gaithersburg, MD: Aspen Publishers, 1997.

Sharpe, Robert F. *Planned Giving Simplified: The Gift, the Giver, and the Gift Planner*. New York, NY: John Wiley & Sons, Inc., 1999.

Warwick, Mal. *How to Write Successful Fund Raising Letters*. Berkeley, CA: Strathmore Press, 1994.

Williams, Karla A. *Donor Focused Strategies for Annual Giving*. Gaithersburg, MD: Aspen Publishers, 1997.

### Purpose of the Course:

This course is designed to introduce students to the history, major concepts, strategies, issues and approaches to resource development and philanthropy in non-for-profit organizations. The intention is to cover a wide range of topics related to the field in order to understand the development process, to understand issues affecting the fund-development profession and to learn applied writing and analytical skills associated with the profession. Throughout the course the following areas will be considered: ethical & moral concerns, legal issues, philanthropy's context in society, and the underlying philosophy relating to fund-development activities.

### Learning Outcomes:

The course readings, written assignments and in-class exercises are designed to produce the following outcomes: You will: (1) learn about the context of philanthropy and fundraising in American society; (2) understand the major components of a fundraising program, including strategies, record keeping and follow-up activities; (3) will become familiar with management issues including staffing, budgeting and administration as it relates to the development function in non-profits; (4) become familiar with the publications and organizations related to the field of fundraising; (5) be able to generate case statements and appeals for fundraising; and (6) be able to analyze and evaluate an effective fund development plan.

### Course Requirements:

All students are expected to attend and participate in each class during the semester. Relevant and thoughtful class participation is expected on the part of each student. You will be expected to have read and thought about the material, and be ready to discuss it appropriately. Each student will also be required to complete the following graded assignments:

1. All students will complete and present one research project. The *papers a due no later than March 26* and should be 5-10 pages on a topic approved by the instructor. Papers should address a current development issue or an ethical issue related to the field. The writing should demonstrate the student's understanding of the chosen topic as well as the relevance of the topic. Students will present their research to the class.

(Paper 30%)  
(Presentation 10%)

2. All students will complete a mid-term examination.

(Mid-term Exam 25%)

3. All students will be required to complete a final examination consisting 5 of 6 essay/thought questions.

(Final Exam 35%)

PSC 550 Philanthropy and Resource Development  
 Spring 2008  
 6:30-9:20 pm, Wednesdays

Date	Topic/Activity
1/16/08	Week 1: Introductions <ul style="list-style-type: none"> <li>• Course overview and requirements</li> <li>• Review of resources</li> <li>• History of philanthropy</li> </ul>
1/23/08	Week 2: Laying the Foundation for Fund Development: <ul style="list-style-type: none"> <li>• Why people give</li> <li>• Organizational strategic planning</li> <li>• The process of development</li> <li>• Marketing, creating, enhancing and nurturing donors</li> </ul>
1/30/08	Week 3: Defining an Integrated Development Program: <ul style="list-style-type: none"> <li>• The mix of fundraising methods</li> <li>• A well-integrated development plan</li> <li>• How fundraising evolves over time</li> <li>• Implementing the development program</li> <li>• Ethical considerations</li> </ul>
2/6/08	Week 4: Making the Case <ul style="list-style-type: none"> <li>• What is the case statement?</li> <li>• Writing the case statement</li> <li>• Adaptation and evaluation</li> </ul>
2/13/08	Week 5: Volunteers & Staff: Roles and Responsibilities <ul style="list-style-type: none"> <li>• Motivations: why people volunteer</li> <li>• Roles and responsibilities of staff vs. volunteers</li> <li>• Identifying and retaining volunteers</li> </ul>
2/20/08	Week 6: Managing Information About Prospects and Donors <ul style="list-style-type: none"> <li>• Prospect research</li> <li>• Organizing research</li> <li>• Using research</li> </ul>
2/27/08	Week 7: Annual Giving <ul style="list-style-type: none"> <li>• Defining annual giving</li> <li>• Solicitation techniques</li> <li>• Planning</li> <li>• Stewardship</li> </ul>
3/5/08	Mid-Term EXAM
3/12/08	NO CLASS – Spring Break
3/19/08	Week 8: Special Events <ul style="list-style-type: none"> <li>• The purpose of special events</li> <li>• Choosing the correct event</li> <li>• Planning an event</li> <li>• Realistic expectations</li> </ul>

3/26/08	Week 9: Planned Giving – <b>RESEARCH PAPERS DUE</b> <ul style="list-style-type: none"> <li>• What are planned gifts?</li> <li>• Advantages of planned gifts to organizations</li> <li>• Advantages of planned gifts to the donor</li> <li>• Marketing planned gifts</li> <li>• Role of the governing board</li> </ul>
4/2/08	NO CLASS – I will be attending the AFP International Conference
4/9/08	Week 10: Capital Giving <ul style="list-style-type: none"> <li>• Defining the purpose and benefits of capital campaigns</li> <li>• Components and phases of a capital campaign</li> <li>• The capital campaign planning model</li> </ul>
4/16/08	Week 11: Ethical Standards <ul style="list-style-type: none"> <li>• Donor’s “Bill of Rights”</li> <li>• Standards of ethical practice</li> </ul>
4/23/08	Project Presentations
4/30/08	Project Presentations & Exam Review
<b>5/07/08</b>	<b>Reading Day – NO CLASSES</b>
5/14/08	FINAL EXAM