

PSC 550 – PHILANTHROPY & RESOURCE DEVELOPMENT

INSTRUCTOR Darlene Xiomara Rodriguez, Ph.D., MSW, MPA
INFORMATION: University of North Carolina at Greensboro
Department of Political Science
223 Graham Building

CONTACT Office hours by appointment, immediately after class,
& Thursdays Noon-2pm
INFORMATION: Email: dxrodrig@uncg.edu

COURSE Graham Building; Room 209
MEETINGS: Thursday 6:30pm- 9:20pm

TEACHING PHILOSOPHY: My aim is to promote the building of a quality educational community in the classroom, within the University, and in the community-at-large through readings, discussions, service and experiential learning that cultivate character, promote coherence, foster collaboration, and encourage civic engagement.

I plan to partner with you to advance this objective of life-long learning in the following manner:

- Education that integrates the whole person in coherent learning environments;
- The cultivation of character through integrity and responsibility;
- Establish a community shaped by a common educational purpose which celebrate diversity and shared values of service, reconciliation, justice, and unity;
- Collaborate between school and society which unites students, educators, parents/families, communities, as well as business, civic, government, and religious organizations in a common educational mission through connections and partnerships; and
- Educate and nurture world citizens who engage society through leadership and service.

COURSE DESCRIPTION: This course provides an overview of philanthropy and fundraising in the nonprofit sector. It provides an opportunity for students to gain an understanding of the basic theories, skills, and practices involved in generating funds for nonprofit organizations. Students will also test their resource development knowledge, skills, and abilities in a real-life setting. The course begins with an overview of the fundraising tradition in the U.S. and then proceeds to descriptions of principal donor types, theories and research on donor behavior, and the organizational, legal and ethical contexts of fundraising. We will also examine the various sources of funds and the basic techniques of fundraising and e-philanthropy, including annual giving, planned giving, and capital campaigns.

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- LEARNING OBJECTIVES:** Upon successful completion of this course, students can expect to have:
- A working knowledge of the history of philanthropy in the U.S.;
 - A conceptual framework for understanding the fundamental theories, skills, and practices in nonprofit fundraising;
 - The ability to identify different sources of giving and understanding the characteristics that distinguish each type;
 - An understanding of the practical, ethical, and legal issues involving fundraising
 - The opportunity to apply what they have learned by designing a fundraising plan for a selected nonprofit organization.

REQUIRED TEXTS: *Conducting a Successful Fundraising Program: A Comprehensive Guide and Resource*
Kent E. Dove – John Wiley & Sons, Inc. © 2001
Copies are available at the UNCG Bookstore.
Should you choose to purchase it online, here is the ISBN:
ISBN-0-7879-5352-0

Additional readings, assignments, or library/internet research will be required of you throughout the semester reflecting the theme we are focused on. These readings/assignments will be given to you in class and/or uploaded to Blackboard prior to the next class meeting. It is the student's responsibility to ensure that s/he has access to Blackboard, that s/he knows how to interface with the system, and checks their official UNCG email periodically for course information.

DISABILITY SERVICES: To request and receive accommodations at UNCG you must be registered with the Office of Disability Services (ODS). Students eligible for accommodations must provide me with the corresponding forms by Week 3. If you have any specific questions or concerns call ODS at (336)334-5440 or visit their website: <http://ods.dept.uncg.edu/services/>.

ATTENDANCE POLICY: Your class attendance and tardiness WILL affect your final grade. You are responsible for obtaining class notes and information from your colleagues, the assignments missed, and be prepared for the following class meeting. If you show up late and/or leave early without consulting me first, you may be counted partially or totally absent. Students missing two class sessions will not be eligible to earn an "A" in this course. Students missing more than three classes will not pass the course.

CLASSROOM COURTESY: I fully expect that all students will be engaged in class during our gatherings. Please turn off or otherwise silence all cell phones. Just as you expect your instructors to be prompt and prepared, I expect the same of you (and you should expect the same of each other). Class begins at 6:30pm and ends at 9:20pm. My aim is to start and end class on-time so that you can continue throughout your day as you have carefully scheduled.

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ACADEMIC INTEGRITY:

ALL assignments that take place in and out of class must be your *own* work and *original* for this course. Should a student be found in violation of the policy, the professor will follow the procedures as outlined by the Dean of Students Office. To review the Academic Integrity Policy go to: <http://academicintegrity.uncg.edu/philosophy/>. Ignorance of the policy does not exempt a student from receiving a failing grade for the course, a permanent citation on your academic record, and/or suspension/expulsion from UNCG depending on the severity of the infraction.

GRADING POLICY:

<u>Percentage</u>	<u>Assignment*</u>
62.5%	Written - Fundraising Program (Consulting Group Project) (50%) Individual Task Grade** (10%) Outline (40%) Final Draft & References (12.5%) Group Grade Tangible Deliverables of Fundraising Plan: (6.25%) Case Statement and Agency Overview (6.25%) Branding and Cohesion of Plan Materials
12.5%	Fundraising Program Presentation (Group Presentation)
25%	Fundraising Experiential Exercise
100%	TOTAL

ALL assignments, papers, and projects are due by midnight on a specific Day, unless otherwise stated. Late homework assignments, papers, and/or projects will be docked per day that they are late (i.e. if you earned a “B” and turned the assignment in late by two days you would receive a “C+”). If more than five (5) days late, the assignment will result in an “F” grade. You are welcome to submit duplicate copies of your assignments via email, although ALL assignments must be submitted via Blackboard.

*: Guidelines for each assignment are available on Blackboard and will be discussed in class.

** : The Fundraising Individual Task is a document that should be considered for inclusion in the student’s Nonprofit Portfolio.

CLASS PARTICIPATION:

Participation in this class is NOT separately weighted but WILL play a deciding role if your final grade is on the edge between +/- letter grades. Insightful and informed participation as well as well-presented argumentation is invited during periods of discussion. There will be large and small group facilitated discussion, which will accommodate for different levels of comfort to participate in class. With this in mind participation is critical to the success of our class and will be rewarded. But remember, how much you say is not as important as the *strength and informed insightfulness* of your contribution.

GRADING RUBRIC:

In an effort to approximate as closely as possible the “real world” of work in nonprofit organizations, the performance of participants in this course will be evaluated by the instructor on the basis of evidence of actual mastery of the course goals and objectives, as evidenced in class participation and in the written assignments. Whereas individual progress and efforts are laudatory, the assessment criteria do not accommodate to grading for growth or effort; rather, the focus is upon the evaluation of evidence of the actual level of achievement in relationship to the stated goals and objectives by the end of the grading period, regardless of the person’s level of accomplishment at the outset or the intensity of efforts during the term. Grades are assigned on the basis of the following criteria. If you have any questions about grades, please review these principles:

A - In addition to what is required for a “B”, individual takes extensive initiative in demonstrating exceptional mastery and integration of all areas related to course goals and objectives; makes explicit use of standards of excellence to critically appraise a wide range of resources beyond those covered in this course; creatively synthesizes and formulates innovative approaches to dealing with complex problems; proposes improvements in theory and application to improve field and own contributions to it; demonstrates superior cognitive, affective, and practical mastery of all aspects of this field.

B - In addition to what is required for a “C”, individual clearly describes and assesses concepts from course materials, explores underlying linkages and relationships among concepts and principles; evaluates content, structure, and utilization of material; draws inferences for applications in new situations; demonstrates development of high level of skill in analysis and application of concepts and methods; takes initiative in developing and demonstrating mastery of all course goals and objectives.

C - Individual identifies, distinguishes, illustrates, and applies concepts and principles from course materials to show understanding of some course goals and objectives; demonstrates comprehension and appropriate usage of methods and principles; gives correct answers to questions and satisfactorily addresses most components of assignments; relies extensively on structured instruction for conceptualizing tasks; reflects to a limited extent on own mastery and integration of material.

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The schedule below is the one that we will be using throughout SPRING 2010 for this class. It will serve as a guideline for the pace of the lectures and the coverage of topics. I reserve the right to alter the schedule as necessary as well as bring in outside speakers to instruct on specific topics throughout the course of the semester.

Required readings that are not from the textbook are available on Blackboard (BB)
Course readings are to be read for the day they are discussed in class.

Legend

C#: Chapters in Dove Book

RG: Resource Guide materials in the second half of the text

BB: Check Blackboard for additional readings

DAY (WEEK)	DATE	THEME	ASSIGNMENT(S)
Thursday (Week 1)	1/21/10	Our Learning Community Social and Historical Contexts of Philanthropy	Introduction Expectations History of Philanthropy C1: Tracing Philanthropy's Origins and Defining Fundraising Basics (p. 9-24) BB: Carnegie, "The Gospel of Wealth"
Thursday (Week 2)	1/28/10	Laying the Foundation for Fund Development	C2: Choosing a Campaign Model (p. 25-41) C16: Promoting the Campaign (p. 269-279) C17: Testing Fundraising Potential and Assessing Programs (p. 280-292) RG: 1-3 BB: Gross. "Giving in America: from charity to organized philanthropy" in <u>Charity, Philanthropy, And Civility in American History</u> . Friedman, Lawrence Jacob (Eds.). Cambridge: Cambridge University Press.

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DAY (WEEK)	DATE	THEME	ASSIGNMENT(S)
Thursday (Week 3)	2/4/10	Planning for Fundraising: Strategy and Process	<p>C6: Coordinating the Campaign Structure and Solicitation Process (p. 84-96)</p> <p>C7: Establishing the Campaign Timeline (p. 99-117)</p> <p>C8: Constructing and Using the Standards-of-Giving Chart (p. 118-133)</p> <p>Explore these websites:</p> <ul style="list-style-type: none"> • Association of Fundraising Professionals (www.afpnet.org) • Council for Advancement and Support of Education (www.case.org) <p>Identify the specific ways these organizations serve fundraisers, what resources they provide, and the circumstances under which a fundraiser would make use of them.</p>
Thursday (Week 4)	2/11/10	Developing a Case Statement Who Gives and Why? Patterns of Charitable Giving Outline of Individual Task DUE (10% of grade)	<p>C3: Building and Stating a Case for Support (p. 42-55)</p> <p>RG: 4-6</p> <p>BB: Prince, File, & Gillespie, "Philanthropic Styles"</p> <p>BB: Mount, "Why Donors Give"</p> <p>BB: Lombardo, "Corporate Philanthropy, Gift or Business Transaction?"</p> <p>Read about case statements at:</p> <ul style="list-style-type: none"> • http://www.afpnet.org/resource_center/resource_center_faqs <p>Then do a "GoodSearch" for case statements. Critically examine them for quality and usefulness. Come to class prepared to identify characteristics of good case statements and how to prepare and critique them.</p>

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DAY (WEEK)	DATE	THEME	ASSIGNMENT(S)
Thursday (Week 5)	2/18/10	Researching Prospects, Cultivating Relationships, and Managing Information	<p>C10: Identifying, Researching, and Rating Individuals as Major Gift Prospects (p. 159-182)</p> <p>C11: Cultivating and Soliciting Major Gift Prospects (p. 183-198)</p> <p>RG: 16, 19, 30-31</p> <p>BB: Sargeant, "Relationship Fundraising: How to Keep Donors Loyal."</p>
Thursday (Week 6)	2/25/10	Annual Giving and Diversified Fundraising Strategies	<p>C9: Laying the Foundation: Building the Annual Fund (p. 134-158)</p> <p>RG: 9, 11, 13-15, 26</p> <p>BB: Andreason and Kotler, "The Growth and Development of Nonprofit Marketing." Ch. 1 in <u>Strategic Marketing for Nonprofit Organizations</u>.</p> <p>BB: Skloot, "Evolution or Extinction: A Strategy for Nonprofits in the Marketplace." <u>Nonprofit and Voluntary Sector Quarterly</u>, June 2000, Vol. 29, pp. 315-324.</p> <p>BB: Froelich, "Diversification of Revenue Strategies: Evolving Resource Dependence in Nonprofit Organizations." <u>Nonprofit and Voluntary Sector Quarterly</u>, Sept. 1999, 28, pp. 246-268.</p>

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DAY (WEEK)	DATE	THEME	ASSIGNMENT(S)
Thursday (Week 7)	3/4/10	Planned Giving Capital Giving Midterm evaluations (Anonymously are due in class)	C12: Developing and Marketing a Planned Gift Program (p. 199-209) C13: Structuring Planned Gifts (p. 210-241) C14: Building Lasting Relationships and Developing Lead Gifts (p. 242-254) RG: 21
Thursday (Week 8)	3/11/10	NO CLASS	SPRING BREAK Be safe and have fun!
Thursday (Week 9)	3/18/10	NO CLASS	Meet, plan, and work in your Fundraising Consulting Groups
Thursday (Week 10)	3/25/10	Collaborating with the Public and Private Sector: Government Contracts and Preparing Grant Proposals Final Individual Task & References DUE (40% of grade)	C15: Approaching Corporations and Foundations (p. 255-268) BB: Frumkin and Kim. “The Effect of Government Funding on Nonprofit Administrative Efficiency: An Empirical Test” Explore www.grants.gov and search for funding possibilities in the field served by the nonprofit organization you are studying.
Thursday (Week 11)	4/1/10	Fundraising on and through the Internet	C19: Applying Technology to Fundraising (p. 310-333) BB: Mann, “Legal Implications of the Internet for Nonprofits” from Futter, <u>Nonprofit Governance & Management</u> . Check out these web sites for ideas on using the Internet for fundraising: <ul style="list-style-type: none"> • www.fundraisinginfo.com • www.missionfish.com

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DAY (WEEK)	DATE	THEME	ASSIGNMENT(S)
Thursday (Week 12)	4/8/10	Defining the Roles and Responsibilities of Volunteers and Staff Legal and Ethical Issues in Fundraising Tangible Deliverables of Fundraising Plan DUE (Case Statement; 6.25% of grade)	C4: Defining Roles of Leaders and Top Volunteers in Fundraising (p. 56-70) C5: Recruiting, Educating, and Motivating Volunteers (p. 71-83) RG 8-10, 20, 30 BB: Hopkins, “State Regulation of Fundraising: Legal Issues” from <u>The Law of Fundraising</u> . BB: Balda, “The Liability of Nonprofits to Donors” Explore this web site: www.afpnet.org/ethics
Thursday (Week 13)	4/15/10	The Future of Philanthropy	C18: Using Paid Solicitors and Consultants (p. 293-309) Working with Private and Family Foundations Demographic shifts impacting philanthropy Review of the New 990 Form
Thursday (Week 14)	4/22/10	Consulting Group Presentations Final Presentation to Client and Peers DUE (12.5% of grade) and Client Binder (6.25% of grade)	Nonprofit Guests attend class Consulting Group Presentation of Fundraising Plan to Client and Peers Copies of tangible deliverables must be made available to client. FINALS FIESTA (part 1)!

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DAY (WEEK)	DATE	THEME	ASSIGNMENT(S)
Thursday (Week 15)	4/29/10	Consulting Group Presentations Final Presentation to Client and Peers DUE (12.5% of grade) and Client Binder (6.25%)	Nonprofit Guests attend class Consulting Group Presentation of Fundraising Plan to Client and Peers Copies of tangible deliverables must be made available to client. FINALS FIESTA (part 2)!
Last day of class for Spring Term	5/4/10	Fundraising Experiential Exercise Due (25% of grade)	This assignment can be turned in at any time during the semester. But this is the last day it will be accepted.

Summary of Assignment Due Dates

Assignments, to be considered on-time and for full credit, must be submitted by midnight on the day they are due via Blackboard (unless otherwise noted).

DAY (WEEK)	DATE	TASK DUE
Thursday (Week 4)	2/11/10	Outline of Individual Task Due (10% of individual grade)
Thursday (Week 10)	3/25/10	Final Individual Task & References Due (40% of grade)
Thursday (Week 12)	4/8/10	Tangible Deliverables of Fundraising Plan Due (Group grade; 6.25% of grade (Case Statement))
Thursday (Week 14)	4/22/10	Final Group Presentation to client and peers (12.5% of grade) Two copies of Final Client Binder (Client and Faculty) [tangible deliverables] must be turned in on day of presentation. (6.25% of grade (Client binder)) Finals Fiesta (part 1)!
Thursday (Week 15)	4/29/10	Final Group Presentation to client and peers (12.5% of grade) Two copies of Final Client Binder (Client and Faculty) [tangible deliverables] must be turned in on day of presentation. (6.25% of grade (Client binder)) Finals Fiesta (part 2)!
Final Exam Period	5/4/10	Fundraising Experiential Exercise Due (This assignment can be turned in at any time during the semester. But this is the last day it will be accepted.) (25% of grade)