

**PSC650 – Philanthropy & Resource Development (Wednesday)
Spring 2017**

Tamaki Onishi, Department of Political Science
Curry 328, t_onishi@uncg.edu
Office Hours: Tuesdays 2-3pm or by appointment

Wednesdays 6:30 – 9:20 pm
Classroom: Curry 332

COURSE OBJECTIVES

This course examines the important aspects of the fundraising process as carried out by nonprofit organizations—its value base, understanding donors' giving motivation, preparation of the case for support, implementation of relevant strategies and techniques, assessment of potential sources of support, utilization of human resources, and overall process management. The course will include theory to undergird practice, examination and analysis of current practice, proposal of practice standards, and discussion of ethical problems.

You will have the opportunity to apply fundraising concepts and techniques by completing a learning portfolio of assignments in collaboration with area nonprofit organizations. The learning portfolio will contain an assessment of organizations' fundraising capacity and capability according to the principles and materials discussed in the course.

Learning Outcomes of the Course:

A fundraiser is called upon to analyze and understand an organization's resource needs, and develop and implement a plan to meet those needs using specific strategies and techniques. Students in this course will be asked to do the same. Upon successful completion of this course, you will be able to:

- Understand and apply fundamental principles, techniques and tools in main areas of nonprofit development and fundraising activities to solve practical fundraising problems;
- Analyze and evaluate different sources of giving and fundraising strategies of an actual nonprofit organization and develop recommendations for its improvement;
- Gain a working knowledge of the philanthropic tradition and giving motivation and behaviors of donors;
- Employ an ethical framework to analyze and reflect upon own professional practice; and
- Write and present research findings and recommendations in a professional and convincing manner.

REQUIRED COURSE MATERIALS

Tempel, E.R., Seiler, T.L., & Aldrich, E.E. (eds.). (2011). *Achieving excellence in fundraising*. 3rd Edition. San Francisco, CA: Jossey-Bass.

(The book is available as the UNCG Library e-book via

<https://login.libproxy.uncg.edu/login?url=http://site.ebrary.com/lib/uncgreen/Top?id=10441424>)

The following textbooks are available as the UNCG Library e-books:

Moody, M., & Breeze, B. (2016). *The philanthropy reader*. Routledge.

<http://www.tandfebooks.com.libproxy.uncg.edu/doi/view/10.4324/9781315696805>

Payton, R. L.M & Moody, M. P. (2008). *Understanding philanthropy: Its meaning and mission*. Bloomington, IN: Indiana University Press.

<http://site.ebrary.com.libproxy.uncg.edu/lib/uncgreen/detail.action?docID=10235125>

Sargeant, A., Shang, J., & Associates. (2010). *Fundraising principles and practice*. San Francisco, CA: Jossey-Bass.

<http://site.ebrary.com.libproxy.uncg.edu/lib/uncgreen/detail.action?docID=10375594>

Additional readings will be uploaded to the CANVAS-Files.

Recommended books available as the UNCG Library e-books:

Pettey, J. G. (2008). *Ethical fundraising: A guide for nonprofit boards and fundraisers (AFP Fund Development Series)* (Vol. 175). John Wiley & Sons.

<http://site.ebrary.com.libproxy.uncg.edu/lib/uncgreen/detail.action?docID=10296818>

Salamon, L. M. (2014). *New frontiers of philanthropy: A guide to the new tools and new actors that are reshaping global philanthropy and social investing*. Oxford University Press, USA.

<http://www.oxfordscholarship.com.libproxy.uncg.edu/view/10.1093/acprof:oso/9780199357543.001.0001/acprof-9780199357543>

Smith, B., Shue, S., Vest, J. L., & Villarreal, J. (1999). *Philanthropy in communities of color*. Indiana University Press.

[http://web.a.ebscohost.com.libproxy.uncg.edu/ehost/ebookviewer/ebook/bmx1YmtfXzIzMTg1X19BTg2?sid=94e1687f-550b-4824-8574-](http://web.a.ebscohost.com.libproxy.uncg.edu/ehost/ebookviewer/ebook/bmx1YmtfXzIzMTg1X19BTg2?sid=94e1687f-550b-4824-8574-ae05a0e177e7@sessionmgr4009&vid=2&format=EB&lpid=lp_VII&rid=1)

[ae05a0e177e7@sessionmgr4009&vid=2&format=EB&lpid=lp_VII&rid=1](http://web.a.ebscohost.com.libproxy.uncg.edu/ehost/ebookviewer/ebook/bmx1YmtfXzIzMTg1X19BTg2?sid=94e1687f-550b-4824-8574-ae05a0e177e7@sessionmgr4009&vid=2&format=EB&lpid=lp_VII&rid=1)

Wiepking, P., & Handy, F. (2015). *The Palgrave handbook of global philanthropy*. New York, NY: Palgrave Macmillan.

<http://uncg.worldcat.org/oclc/910514642>

COURSE FORMAT AND POLICY

Course Format and Methods: Over the course of the semester, class sessions will include a combination of discussion, lecture, presentations by fundraising and philanthropy professionals, student presentations, ungraded quizzes, exercises in class and group work, and workshops at a computer lab.

You are highly encouraged to share your ideas and findings relevant to philanthropy and fundraising with your classmates. Such additional contributions will be taken into consideration for your final course grade. If there are any needs in your career development and/or concerns about your grade, don't hesitate to let me know. I am happy to incorporate your interests into class activities as much as possible.

Attendance Policy: You are expected to attend and participate in each class during the semester. If you come late or leave earlier, you will not get the full attendance point for the class meeting. Please do not miss more than two class meeting for a passing grade of the course. In case any extenuating personal or work-related circumstances impact your participation and on-time submission of assignments, please talk to me immediately.

Technology-Related Policy: Nobody should engage in behavior disruptive to classmates or the entire class. For this reason, you are not allowed to use a cell phone during the class. A use of a computer is discouraged. If you prefer to use a computer, you need to get an approval from me first and sit in the front row during the class.

Academic Integrity: All assignments must be your own work and original for this course. If your paper uses someone else's ideas, you must cite the sources by following appropriate guidelines. The information and resources about citation styles are available via the UNCG Library Citation Guides (<http://uncg.libguides.com/c.php?g=83079>). The University's Academic Integrity Policy can be reviewed at <http://sa.uncg.edu/handbook/academic-integrity-policy/>.

If you need accommodation due to a registered disability with the campus office (DS): Please discuss this with the instructor at the beginning of the semester or check the website of the Office of Disability Services (ODS) at <http://ods.uncg.edu/>.

The syllabus and course schedule is subject to change as the instructor or situation warrants. Such changes will be announced in class as soon as possible.

CANVAS RESOURCES

If you need additional help, please use the following resources:

- CANVAS Overview Video <http://guides.instructure.com/m/4210/l/141852-CANVAS-overview-video>
- Students’ CANVAS Guide in the CANVAS Module page, or click this link: <http://guides.instructure.com/m/8470?data-resolve-url=true&data-manual-id=8470>

For overall technology issues, please contact 6-tech: <https://its.uncg.edu/help/>

PARTNERSHIP WITH A NONPROFIT ORGANIZATION

In this course, you will work closely with an actual nonprofit organization (“partner nonprofit”) for your term project. Your partner nonprofit may be an organization that you already have a good relationship with (Let me know in the beginning of the semester) or an organization interested in working with our students. Please talk to me and obtain my approval first before you contact your partner nonprofit.

VERY IMPORTANT: You are expected to maintain professional attitudes in working with your partner nonprofit in this partnership fieldwork project. Please be responsive and responsible in your communications with your partner as well as your group members. **You should discuss meeting schedules and requirements for your all assignments during your first meeting and contact your partner nonprofit for information you need for assignments at least two weeks before deadline.** It will help you obtain necessary data to complete assignments on time and allows enough time for the people at your partner nonprofit. In case any issue arises, please contact me as soon as possible.

ASSESSMENT AND GRADING

Assignments	% of Total	Descriptions	Due Date
Term Project	60% total		
Portfolio Assignments (individual)	(45%)	15% (150 points) for each assignment	2/22, 3/8, 3/22
Final Paper and Presentation (group)	(15%)	10% (100 points) for paper and 5% (50 points) for presentation; the grade to be adjusted by evaluation from a nonprofit liaison and team members	4/26
Philanthropy Analysis/ Giving Motivation Paper	15%		4/12
Oral Presentation	10%		Sign-up
Class Participation	15%	Main grading criteria includes class preparation assignments and contribution	Ongoing
TOTAL	100%		

Course Grade Grading Scale: A (93-100%) A – (90-92%) B+ (88-89%) B (85-87%) B- (80-84%) C+ (78-79%) C (75-77%) C- (70-74%) F (0-69%).

COURSE SCHEDULE

Materials listed under “Readings” -- All of you are required to read these materials prior to the class meeting, unless otherwise noted.

Readings Assigned for Student Presentation – These materials are required for an assigned presenter and optional for other students.

Class Preparation Assignment is a written summary to complete in advance and be prepared to discuss in class. Please see more details about this assignment in the section “Class Participation and Contributions.”

WEEK 1 INTRODUCTION: WHAT IS PHILANTHROPY?
1/18

Guest Speaker: Susan Schwartz, Executive Director, The Cemala Foundation (7pm~)

Decide your nonprofit partner and team for the term project

Readings:

- Rosso “Ch. 1 A philosophy of fundraising” (AE - from Tempel et al. *Achieving excellence in fundraising*)
- Payton & Moody “Introduction” and “Social history” (eBook)
- SKIM - Rooney & Nathan “Ch. 10 Contemporary dynamics of philanthropy” (AE)
- Moody & Breeze – Ilchman et al. “Philanthropy in the world’s traditions” (eBook)
- Moody & Breeze - Sulek “On the classical and modern meanings of philanthropy” (eBook) **MPA student reading requirement:** MPA students (both current and prospective) should read Sulek’s original scholarly articles, “On the Modern Meaning of Philanthropy” and “On the Classical Meaning of Philanthropía (CV)
- Philanthropy quotes <https://www.nptrust.org/index.php?/history-of-giving/philanthropic-quotes/>

Video (watch before the class meeting):

Alaimo “What is Philanthropy?”

- Documentary trailer <https://youtu.be/qNgK7KnCEtM>
- Philanthropy as a Framework for Democracy <https://youtu.be/RmpaGGwHwVQ?list=PL0cYSdjkPk9ajlU50UgAiVEZ-sp09t3S7>
- Meeting Society’s Needs through Philanthropy <https://youtu.be/BiXkjTmbHnQ?list=PL0cYSdjkPk9ajlU50UgAiVEZ-sp09t3S7>

WEEK 2 PHILANTHROPY: THEORIES, RATIONALES AND ETHICS FOR
1/25 STRATEGIC FUNDRAISING

Class-Prep Assignment: a 1-2 page summary of (1) theories and key concepts in Bekkers & Wiepking article and 3 other readings (e.g., Moody & Breeze readers, Prince & File and/or Smith et al.) and (2) your ideas of how these theories can be applied to fundraising practices. The summary may be elaborated and expanded for your Philanthropy Analysis/Giving Motivation paper.

Readings:

- Tempel “Ch. 35 Ethical frameworks for fundraising” (AE)
- Moody & Breeze - Bekkers & Wiepking “Eight mechanisms that drive charitable giving” **MPA student requirement:** MPA students should read their NVSQ article, Bekkers, R., & Wiepking, P.

(2010). A literature review of empirical studies of philanthropy: Eight mechanisms that drive charitable giving. *Nonprofit and Voluntary Sector Quarterly*. (CV)

- OPTIONAL - Purcell “Ch. 36 The law and fundraising” (AE)
- OPTIONAL - Sargeant & Shang “Ch. 4 Individual giving behavior” (eBook)

Read 3 of the following materials (Article by Andreoni, Reich, or Ostrander & Schervish should be included):

- Moody & Breeze – read the following (eBook):
 - Burlingame “Philanthropy is not the same as altruism”
 - Andreoni “The economic explanation of philanthropy,”
 - Reich “A political theory of philanthropy”
 - Ostrander & Schervish “Giving and getting”
 - Smith & Davidson “How generosity enhances well-being”
- C.S. Lewis “Charity” (CV)
- Prince & File *Seven faces of philanthropy* (CV)
- Smith et al., *Philanthropy in communities of color* “Conclusion” (CV)

WEEK 3 FUNDRAISING AUDIT AND CASE

2/1

Guest Speaker: Michelle Schneider, Senior Counsel, CapDev (7pm~)

Class-Prep Assignment: (1) 5 copies of a 1-page summary of recent news on “PEEST” factors that may affect nonprofit fundraising (Please find details about PEEST in Sargeant & Jay chapter) and (2) case for support of your partner nonprofit, if any. The summary will be revised/expanded for your Portfolio Assignment #1. Use the resources listed below to find relevant news for each area of PEEST.

MPA students – Inform the instructor of a working plan of your Philanthropy Analysis Paper

Readings:

- Seiler “Ch. 2 Plan to succeed” (AE)
- Seiler “Ch. 3 Developing a consistency for fundraising” (AE)
- Seiler “Ch. 4 Developing and articulating a case for support” (AE)
- Sargeant & Jay “The fundraising audit” (CV)
- *Giving USA 2016 Highlights* (CV)

Resources for PEEST factors/nonprofit news:

- Chronicle of Philanthropy (www.philanthropy.com)
- Nonprofit Times (www.thenonproffitimes.com)
- Nonprofit Quarterly (<https://nonprofitquarterly.org>)
- Philanthropy News Digest/Foundation Center (<http://philanthropynewsdigest.org/>)
- Independent Sector Public Policy (<http://www.independentsector.org/policy/>)
- NC Center for Nonprofits Public Policies (<http://www.ncnonprofits.org/voice/policy-issues>) and Policy Priorities (<http://www.ncnonprofits.org/voice/priorities>)
- Association of Fundraising Professionals Public Policy (<http://www.afpnet.org/PublicPolicy/?navItemNumber=4618>)
- Newspapers (e.g., *New York Times*) and magazines (e.g., *Forbes*)

WEEK 4 THE TOTAL DEVELOPMENT PLAN

2/8

3 Student Presentations

Class-Prep Assignment: a 1-page summary of your partner nonprofit’s current fundraising activities and donor profiles for class exercise (If you cannot obtain information from your partner nonprofit, please use available resources, such as website, annual report, and Form 990). The summary will be revised/expanded for your Portfolio Assignment #1.

Readings:

- Seiler “Ch. 5 Total development plan” (AE)
- Rosso “Ch. 6 The annual fund” (AE)
- Enright & Seiler “Ch. 23 The practice of stewardship” (AE)
- Crossnickle “Ch. 24 The trustee’s role in fundraising” (AE)
- Elkas “Ch. 27 Managing the fundraising program” (AE)
- Klein “Ch. 34 Fundraising for grassroots nonprofits” (AE)

Readings Assigned for Student Presentation (1): Data

- Nonprofit Research Collaborative. *Nonprofit Fundraising Study Winter 2016* (CV) – read pp. 19-34.
- *2016 Fundraising Effectiveness Survey Report* (CV) – read pp. 9-21.
- Blackbaud *Charitable giving report: How nonprofit fundraising performed in 2015* (CV)

Readings Assigned for Student Presentation (2): Strategies and evaluation

- Sargeant & Shang “Ch. 9 Assessing Fundraising Performance” (eBook)
- Boenigk, S., & Scherhag, C. (2014). Effects of donor priority strategy on relationship fundraising outcomes. *Nonprofit Management and Leadership*, 24(3), 307-336. (CV)

Readings Assigned for Student Presentation (3): Donor retention

- Sargeant & Shang “Ch. 12 Donor Retention and Development” (eBook)
- Jackson, K. (2016). The effect of social information on giving from lapsed donors: Evidence from a field experiment. *VOLUNTAS*, 27(2), 920-940. (CV)

WEEK 5 ANNUAL FUND PROGRAMS
2/15

Guest Speaker: Elizabeth Minehart, Director of Annual Campaigns and E-Communication, YMCA of Greensboro

1 Student Presentation

Class-Prep Assignment: (1) Post a couple of questions regarding various annual fund programs you learn from the required readings (I will gather your questions for a guest speaker) in CANVAS-Discussions by 2/15, 4pm and (2) bring a copy of a solicitation letter of your partner nonprofit, if any, to class exercise (for your Portfolio Assignment #2).

Readings:

- Warwick “Ch. 19 Direct mail marketing” (AE)
- Purvis “Ch. 22 Telephone solicitation” (AE)
- Stranger “Ch. 20 E-Mail and internet solicitation” (AE)

Readings Assigned for Student Presentation (1): Effective solicitation letters

- Bekkers, R., & Crutzen, O. (2007). Just keep it simple: A field experiment on fundraising letters.
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International Journal of Nonprofit and Voluntary Sector Marketing, 12, 371-378. (CV)

- Diamond, W. D., & Gooding-Williams, S. (2002). Using advertising constructs and methods to understand direct mail fundraising appeals. *Nonprofit Management and Leadership*, 12(3), 225-242. (CV)
- Goering, E., Connor, U. M., Nagelhout, E., & Steinberg, R. (2009). Persuasion in fundraising letters: An interdisciplinary study. *Nonprofit and Voluntary Sector Quarterly*, 40(2), 228-246. (CV)

WEEK 6 **ANNUAL FUND (CONT., SPECIAL EVENT, AND ePHILANTHROPY)**
2/22 ******* Portfolio Assignment #1 Due *******

3 Student Presentations

We may use a computer lab (Curry 304) for ePhilanthropy (TBD)

Readings:

- Love “Ch. 26 Using social media to energize and mobilize your volunteers” (AE)
- Sargeant & Shang “Cox Ch. 19 Fundraising events” (eBook)
- AFP “Social media guideline” (CV)

Readings Assigned for Student Presentation (1): ePhilanthropy

- Sargeant, A., West, D. C., & Jay, E. (2007). The relational determinants of nonprofit web site fundraising effectiveness: An exploratory study. *Nonprofit Management and Leadership*, 18(2), 141-156. (CV)
- Saxton, G. D., & Wang, L. (2013). The social network effect: The determinants of giving through social media. *Nonprofit and Voluntary Sector Quarterly*, 43(5) 850 –868. (CV)
- Convio. *Using the Internet to raise funds and build donor relationships* (CV)

Readings Assigned for Student Presentation (2): Case study of social media fundraising and crowdfunding

TALK TO THE INSTRUCTOR TO CHOOSE CASES NO LATER THAN WEEK 3 CLASS

Readings Assigned for Student Presentation (3): Case study of special event/peer-to-peer fundraising

TALK TO THE INSTRUCTOR TO CHOOSE CASES NO LATER THAN WEEK 3 CLASS

WEEK 7 **CORPORATE AND FOUNDATION GIVING**
3/1

Guest Speaker: Kevin Lundy, Program Officer, The Community Foundation of Greater Greensboro (6:30pm~)

2 Student Presentations

Class-Prep Assignment: TBA (the topics possibly related to case studies and your portfolio assignments for corporate/foundation giving)

Readings:

- Davis “Ch. 13 Foundation fundraising” (AE)
- Sargeant & Shang “Burlingame & Sargeant, Corporate giving and fundraising” (eBook)
- Kania, J., & Kramer, M. (2011). Collective impact. *Stanford Social Innovation Review*, 36-41 (CV)

Readings Assigned for Student Presentation (1): Corporate giving motivation and nonprofit-

corporate collaboration strategies

TALK TO THE INSTRUCTOR TO CHOOSE READING MATERIALS NO LATER THAN WEEK 4 CLASS. Possible readings include the following:

- Omar, A. T., Leach, D., & March, J. (2014). Collaboration between nonprofit and business sectors: A framework to guide strategy development for nonprofit organizations. *VOLUNTAS*, 25(3), 657-678. (CV)
- Moody & Breeze – Friedman “The social responsibility of business is to increase its profits” (eBook/CV)

Readings Assigned for Student Presentation (2): Case study of corporate philanthropy

TALK TO THE INSTRUCTOR TO CHOOSE CASES NO LATER THAN WEEK 4 CLASS (You will possibly use the Committee Encouraging Corporate Philanthropy (CECP) or the Foundation Center’s list to find cases.)

Discuss a “Fundraising Personality Test” for Week 8 class

WEEK 8 **MAJOR GIFTS AND CAPITAL CAMPAIGNS**
3/8 ******* Portfolio Assignment #2 Due*******

Guest Speaker: Timothy A. Minor, Vice President, University Advancement, The University of North Carolina System (6:30pm~)

1 Student Presentation

“Fundraising Ask” exercise

Readings:

- Pierpont “Ch. 8 Capital campaigns” (AE)
- Heil & Bate “Ch. 15 High-net-worth donors” (AE)
- Gattle “Ch. 18 Personal solicitation” (AE)
- Skim - Maxwell “Ch. 33 Selecting and working with fundraising consultants” (AE)
- “Analyzing fundraisers' personalities can help them click with donors” (CV)

Readings Assigned for Student Presentation (1): Major donor giving motivation

- Carnegie “The gospel of wealth” (CV)
- Schervish, P. G. (2006). The moral biography of wealth: Philosophical reflections on the foundation of philanthropy. *Nonprofit and Voluntary Sector Quarterly*, 35(3), 477-492. (CV)
- Ostrander, S. A. (2007). The growth of donor control: Revisiting the social relations of philanthropy. *Nonprofit and Voluntary Sector Quarterly*, 36(2), 356-372. (CV)

3/15 **NO CLASS (Spring Break)**

WEEK 9 **PLANNED GIVING**
3/22 ******* Portfolio Assignment #3 Due*******

Guest Speaker: David Landers, J.D., Director of Planned Giving, UNCG (6:30pm~)

Before the next week: Send me your brief research proposal (1 page) of the Giving Motivation/Philanthropy Analysis paper (the main objectives and paper

outline) along with a list of bibliography by the next class meeting. I will get back to you as soon as possible to help you prepare for the following week’s discussion.

Group Preparation for the Term Project: Bring a copy of your ALL_portfolio assignments. You and your team members will decide (1) portfolio assignments (all or selected) that a group will share with your partner nonprofit and use for the final paper and (2) a plan to complete a final paper and presentation.

IMPORTANT NOTE: Send the portfolio to your partner nonprofit no later than 3/23, seeking feedback by 4/10.

Readings:

- Regonovich “Ch. 9 Establishing a planned giving program” (AE)
- Partnership for Philanthropic Planning "Becoming an effective listener” (CV)
- Partnership for Philanthropic Planning “Are you ready for planned giving?” (CV)
- *Skim* - Partnership for Philanthropic Planning “Model standards of practice for the charitable gift planner” (CV)

WEEK 10 **MPA SPEAKER EVENT**
3/29

Advising sessions for certificate students from 6:00pm to 7:20pm

No readings required.

WEEK 11 **GIVING MOTIVATIONS AND BEHAVIORS: UNDERSTANDING CULTURE**
4/5 **AND DIVERSITY**

5 Student Presentations

Class-Prep Assignment: Bring a draft of the Giving Motivation/Philanthropy Analysis Paper (at least the annotated bibliography section) for class discussions and peer critique (Post in CANVAS-Discussion by 4/4, 11:59 pm).

Readings:

- Mesch & Pactor “Ch. 14 Women as donors” (AE)
- Wagner “Ch. 16 Ethnicity and giving” (AE)
- Brown & Kou “Ch. 17 Giving differences among the generations” (AE)

Readings Assigned for Student Presentation (1): Giving motivation

TALK TO THE INSTRUCTOR TO CHOOSE READING MATERIALS NO LATER THAN WEEK 8 CLASS. Possible readings include the following:

- Sargeant & Shang “Ch. 4 Individual giving behavior” (eBook)
- Center on Philanthropy “Understanding donors’ motivations: Executive summary” (CV) - Read pp. 4-7.
- Van Slyke, D. M., & Brooks, A. C. (2005). Why do people give? New evidence and strategies for nonprofit managers. *American Review of Public Administration*, 35(3), 199-222. (CV)

Readings Assigned for Student Presentation (2): Philanthropy and religion

TALK TO THE INSTRUCTOR TO CHOOSE READING MATERIALS NO LATER THAN WEEK 8 CLASS. Possible readings include Dalai Lama “Giving and Receiving,” and a scholarly journal article.

Readings Assigned for Student Presentations (3)(4): Philanthropy and diversity

TALK TO THE INSTRUCTOR TO CHOOSE READING MATERIALS NO LATER THAN WEEK 8 CLASS. Possible readings include the following (you will read 2-3 materials).

- Andreoni, J., Payne, A. A., Smith, J., & Karp, D. (2016). Diversity and donations: The effect of religious and ethnic diversity on charitable giving. *Journal of Economic Behavior & Organization*, 128, 47-58.
- Conley, D. (2000). The racial wealth gap: Origins and implications for philanthropy in the African American community. *Nonprofit and Voluntary Sector Quarterly*, 29(4), 530-540.
- Mason, D. P. (2016). Recognition and cross-cultural communications as motivators for charitable giving: A field experiment. *Nonprofit and Voluntary Sector Quarterly*, 45(1), 192-204.
- Leslie, L. M., Snyder, M., & Glomb, T. M. (2013). Who gives? Multilevel effects of gender and ethnicity on workplace charitable giving. *Journal of Applied Psychology*, 98(1), 49.
- Chapters from Smith et al. *Philanthropy in communities of color* (eBook), *New Direction of Philanthropic Fundraising series*, etc.

Readings Assigned for Student Presentation (5): International philanthropy

TALK TO THE INSTRUCTOR TO CHOOSE READING MATERIALS NO LATER THAN WEEK 8 CLASS. Possible readings include the following chapters from Wiepking & Handy (2015). *The Palgrave handbook of global philanthropy* (eBook).

WEEK 12
4/12

PROSPECT RESEARCH

**** Philanthropy Analysis/ Giving Motivation Paper Due ****

Guest Speaker: Kathy Mills, Senior Donor Identification Analyst, Office of Development and Alumni Affairs, Wake Forest Baptist Medical Center (6:30pm~)

2 Student Presentations

We will use a computer lab (Curry 304) for prospect research

Readings:

- Martin “Ch. 11 Prospect research” (AE)
- Lindauer “Ch. 30 Donor database management and segmentation” (AE)
- REREAD - Seiler “Ch. 3 Developing a consistency for fundraising” (AE)

Readings Assigned for Student Presentations (1)(2): Case studies of donor management databases and Internet resources

TALK TO THE INSTRUCTOR TO CHOOSE CASES NO LATER THAN WEEK 9 CLASS.

WEEK 13
4/19

CAREER, CURRENT ISSUES, AND FUTURE TRENDS FOR EFFECTIVE PHILANTHROPY

Guest Speaker: Miriam E. Bradley, CFRE, Director of Development for Strategic Initiatives UNCG

2 Student Presentations

Readings:

- Aldrich “Ch. 37 Fundraising as a profession” (AE)
- Aldrich “Ch. 39 Preparing for the CFRE exam” (AE)
- Hale “Ch. 40 International perspectives on fundraising” (AE)

- Pribbenow “Love and work: Rethinking our models of professions” (CV)

Readings Assigned for Student Presentations (1)(2): New trends of philanthropy

TALK TO THE INSTRUCTOR TO CHOOSE READING MATERIALS NO LATER THAN WEEK 9 CLASS.

Final Group Preparation for the Term Project

WEEK 14 TERM PROJECT PRESENTATION

4/26

******* Term Project Presentation and Paper Due (submit paper via Canvas Assignments) *******

Philanthropy Analysis/ Giving Motivation Paper

NPM Certificate Student paper requirement (Giving Motivation Paper):

Produce a **3-4 page, double-spaced paper on giving motivation analysis**, along with a **1 page, single-spaced annotated bibliography of at least 2 research articles that are different from the required course readings** (Sample research articles will be available in CANVAS-Files). You do not need to link the articles you choose for the annotated bibliography to your analysis on giving motivation, while you may if it strengthens your analysis.

To prepare your Giving Motivation Paper, first interview with donor and/or active volunteers whom you know well (e.g., a family member or friend) or your partner nonprofit’s current or prospective donor. Then, **use key concepts and theories from the course readings** to analyze your interviewees’ giving behavior and motivation. **Keep the names of the donors strictly confidential.** You do not need to link the articles selected for annotated bibliography to your analysis on giving motivation, while you may if it strengthens your research.

The outline/questions to address in your giving motivation paper:

- Description of the motivations and behaviors for giving for each donor (What did they give—money, time, skill, or any other resources—and why?).
- Analysis of how their giving motivation and behaviors relate to the theory and ideas from class readings and discussions (Why did they choose a particular organization/s or individual/s to support? What are particular emotion, religion, or cultural factors affecting their giving motivation and behaviors? What does philanthropy mean to them?).
- Reflection -- How are you personally motivated to give? What factors can influence your own personal giving? Basing your answer in theory, how could you as a fundraiser do a better job to motivate individual donors to give?

MPA student (current and prospective) paper requirement (Philanthropic Analysis Paper):

You will decide the topic of your **5-7 page, double-spaced analysis paper**, along with a **1-2 page, single-spaced annotated bibliography**. Examples of a research topic include challenges in the philanthropic sector, tax policies that affect giving and fundraising, social change philanthropy, “new” philanthropy (venture philanthropy and impact investing), impacts of corporate social responsibilities on charitable philanthropy and fundraising, the religious and philosophical literature as a theoretical lens to analyze philanthropy, giving and fundraising in diverse communities, or any other theme covered in the course. You may choose the topic for certificate students if you wish. **We will talk about a working plan of your analysis paper in Week 3.** Your paper should adhere to the APA format or another appropriate citation format.

MPA students must use at least 3 scholarly articles from to major nonprofit peer-reviewed journals (*Nonprofit and Voluntary Sector Quarterly*, *Nonprofit Management and Leadership* and *Voluntas*) and/or top management peer-reviewed journals (e.g., *Academy of Management Journal*, *Administrative Science Quarterly*, *Journal of Management*, *Journal of Business Venturing*, *Entrepreneurship Theory & Practice* – please talk to me about other main management journals).

Term Project Assignments

Your term project constitutes (1) Portfolio Assignments, (2) Final Paper, and (3) Presentation. You will develop Portfolio Assignments individually and develop your Final Paper and Presentation as a group of 3-5 students.

Your papers should follow APA citation style, except the sections for practical fundraising tools (e.g., a direct mail letter). Grading for your portfolio assignments will be based on your papers' clarity, organization, rigorous analysis, coverage, and linkages to the course readings. A copy of the grading rubrics is available in the CANVAS-Module/Files.

1. **Portfolio Assignments:**

You will have three (3) portfolios to complete solo. See more details in the last section of this syllabus for the requirements for each portfolio assignment. **You should share your all portfolio assignments with your partner nonprofit by March 23rd to receive feedback**, which you will need to complete your final paper (see below).

2. **Final Paper:**

Building on the portfolio assignments, you and your teammates will complete the final paper. Your group's final paper must demonstrate a **significant improvement** of the original portfolio assignments—more fully developed ideas or added analysis as well as stylistic revisions—**by incorporating feedback from your partner nonprofit and instructor**. You and your team members will have an opportunity to discuss a plan to develop the final paper during Week 9 class meeting.

Your final paper should contain the following elements:

Cover memo (1 page):

- Provide a brief explanation about (1) feedback you receive from your partner nonprofit and instructor and (2) how you elaborate your paper based on the feedback.

The main body:

- **Introduction:** Clearly state main objectives and outline of the final paper.
- **Assessment:** Assess the efficiency and effectiveness of various fundraising programs and tools, using the analytical framework and key concepts we learn from course readings (e.g., “fundraising audit” and “total development plan”).
- **Recommendations and Rationale (a main part):** This section should start with a brief explanation of why the recommended fundraising program/s is/are the most appropriate. Then, describe the specifics of fundraising program/s and strategy/-ies you recommend to your partner nonprofit.
- **Execution Plan:** Explain how the recommended fundraising program/s should be executed. Examples include team construction (e.g., a fundraiser, board, and/or other volunteers), time frame/ calendar of fundraising campaign or special event, feasibility, anticipated expenses, and/or a fundraising goal.
- **Fundraising Tools:** Please include practical tools that your nonprofit partner can apply to their fundraising practice, such as a solicitation/acknowledgement letter, a list and findings of

prospect research on corporate and foundation donors, special event communication tools, agenda and budget, and/or a fundraising campaign plan and calendar.

Please send a copy of the final paper to your partner nonprofit for their evaluation no later than April 27th (or bring a copy on the final presentation day).

3. Final Presentation:

You and your team members will prepare a Powerpoint presentation to highlight main points of the final paper. Representatives from our partner nonprofits will be invited to the final presentation event. All in your group will participate in a group presentation. Your presentation will be evaluated by your partner nonprofit and classmates. Grading rubrics will be available in the CANVAS-Files.

Oral Presentation

Once during the semester, each student will be asked to deliver a presentation about a case analysis or literature. The topic and literature/case materials assigned for each presentation are listed in the syllabus. **At least 3 weeks prior to a presentation**, you should talk to me about the progress and presentation plan (especially if the syllabus suggests talking to me about reading or case selection).

Each presenter will also write a **1-3 page, single-spaced summary** to distribute to all class members and the instructor. Your write-up should contain (1) explanation of **key concepts and major findings** in each reading/ case, (2) your idea of **how these implications can inform fundraisers** (e.g., how can fundraisers use the findings to develop their own fundraising strategy to ask for donor support?), and (3) **1-3 discussion questions** designed to prod thinking of the class.

At least 2 day prior to the presentation, each student will **send me a copy of the write-up** to post on CANVAS-Discussions for the class to read and bring a copy to the class. If you are unable to send me the summary by then, you will prepare an enough number of copies for your classmates. A use of a presentation aid (e.g., PowerPoint and/or handouts) is encouraged. Presentations should **be limited to 10 minutes, with an additional 5-10 min. for discussion and questions.**

Class Participation and Contributions

You are expected to attend all class meetings and participate fully in course activities and discussion. 15% of your final grade is class preparation and participation, which includes consideration of your Class Preparation Assignments. **The main purpose of Class Preparation Assignments is to help you start working on the portfolio assignments and analysis paper** as well as actively participate in class discussions. This is an ungraded assignment, but I will check that you prepare a copy of the written summary. Failure to prepare a Class Preparation Assignment (especially if repeated) may result in the decreased final grade. Thus, please do your best to bring a written summary to class although it may not be as elaborated as you wish.

Here are other guidelines for the contribution grade in this course:

- Bring articles from trade publications (e.g., *Chronicle of Philanthropy*) to class.
- The quantity and quality of your active participation in class/group activities.
Present your findings from a fundraising event, volunteer experience or a professional meeting – You will be given an extra credit by writing a short reflection paper (1-2 pages, single-spaced) on this topic.

Description of Portfolio Assignments (PSC650 Wednesdays)

There is no requirement for minimum or maximum page length, while the following description provides your single-spaced paper for each portfolio **topic** is likely to need at least 2 pages to address all important points. Please **do NOT copy passages describing your partner nonprofit from the existing materials (e.g., the website) and use them for your assignments**. If you need to use your partner nonprofit’s existing passages verbatim (e.g., mission statement), you must add appropriate citation information to them.

******* Portfolio Assignment 1 *******

Topic 1) Fundraising Audit and Case Preparation (Week 3): (1) Summarize what external and internal factors may affect the organization’s fundraising activities in a brief report. Considering macro and micro factors affecting your partner nonprofit; and (2) Based on findings from your auditing, develop a case statement (a short version) that will inspire support for your nonprofit partner. Is there an official case statement for support to the organization (or recent fundraising campaign)? If so, assess the case by using the course readings/handouts and revise it based on your assessment. Briefly explain how you revise the existing case and why.

Topic 2) Assessment of Total Development Program (Week 4): By using framework from “The Total Development Plan,” and other resources, such as Nonprofit Research Collaborative Nonprofit Fundraising Study, assess your nonprofit’s total development program. Write a brief report to explain the findings and make any recommendations for how their development program can be improved. Your report should address the following questions.

- Description of the basic sources for funding, such as individuals (e.g., alumni, event participants, and/or board members), corporations, foundations, and/or governments. How much is typically raised from each source each year? Use actual dollars and percent as much as possible.
- What programs does the organization use for fundraising? (e.g., donor acquisition, renewal, upgrade, major gifts, planned giving, capital campaigns)
- Does your organization conduct an annual fund program? What fundraising tools and strategies are currently used? (e.g., direct mail, telemarketing, ePhilanthropy, special events)
- **MOST IMPORTANT** – What area/s of fundraising does your partner nonprofit wish to improve?

******* Portfolio Assignment 2 *******

NOTE: This is an individual paper assignment. However, if you and your team members would like to develop a coherent plan for your partner nonprofit’s annual fund strategies, you may submit the portfolio topic 4 (Annual Fund Strategies of Expanding a Donor Base) as a group. Please indicate who is responsible for which section. You are still required to write your own solicitation letter for individual donors (the portfolio topic 3).

Topic 3) Solicitation Letter to Individual Donors (Week 5): Write a direct mail letter or an electric appeal asking individual donors for annual fund gifts to your partner nonprofit. The letter can be for donor acquisition, gift renewal, or gift upgrade. Use research available to explain why you make your recommendations for wording, format, and images.

Topic 4) Annual Fund Strategies of Expanding a Donor Base (Weeks 5 and 6): Analyze what programs (e.g., direct mail, ePhilanthropy, and special events) can be expanded, revised and/or added to attract new donors. Where is the best potential for attracting new donors and why? Be sure to focus on

prospect donors’ “linkage, ability and interest” (see in Seiler “Ch. 3 Developing a Consistency for Fundraising”). Then, develop a plan to reach the prospect/s. This may be special event, direct mail, telemarketing campaign, and/or Internet, or a combination of any. Some examples are as follows:

If you choose a special event (see more in the CANVAS resources for special event and feel free to use any example as a base):

- (1) Event venue including the possible cost if you rent it, audio/visual information, parking information
- (2) Timetable/agenda, theme of the event (if you feature a specific program or beneficiaries of your case nonprofit)
- (3) Marketing: flyers, invitations, programs, and/or press releases
- (4) Staff, committee, and/or volunteer commitments (who will do what and how many)
- (5) Food catering estimates & menus, a possible vendor if you hire one
- (6) Cost estimates for supplies, etc., if any

If you choose a mail or telemarketing campaign:

- (1) Timetable
- (2) A “solicitor” if any (e.g., board member, CEO)
- (3) Staff, committee, and/or volunteer commitments (who will do what and how many)
- (4) Any vendor who creates a direct mail package or any consultant/volunteers who place a direct call
- (5) Cost estimate

If you choose ePhilanthropy and social media: By reviewing ePhilanthropy examples posted on CANVAS and the course readings, explain which ePhilanthropy tools that your partner nonprofit can use and how the organization should use these tools to raise fund or manage donor relationship.

***** **Portfolio Assignment 3** *****

Topic 5) Corporate or Foundation Inquiry Letter and Fundraising Strategies (Week 7): Identify a corporation or foundation as the most likely prospect for your partner nonprofit (based on the analysis on linkage and interest) and prepare a brief report to the partner nonprofit that explains why you chose the funder and how they should approach it. Then, write a 1-2 page letter of inquiry that could be used to introduce your partner nonprofit to the prospective funder. If your partner nonprofit wishes to launch a cause-related or sponsorship campaign with a corporate donor, you can prepare the plan for it instead. Use available resources and identify foundation and/or corporate prospects for your partner nonprofit. List the ones you review.

Topic 6) Major Gift Solicitation and Stewardship Plan (Week 8): Prepare a brief report for effective solicitation for a prospective **major donor** (not a small annual fund donor or institutional [corporate/foundation] funder) and stewardship strategies that your partner nonprofit can utilize to approach their major donor (or capital campaign or planned giving) prospect. Your report should discuss:

- Who is/are the appropriate solicitor/s representing your partner nonprofit, and why?
- What are possible questions that the prospective donor may ask? How much would they ask for, and for what? Prepare possible answers that your partner nonprofit can use for these questions.
- Your report will also include your recommendations for appropriate way to acknowledge and steward a donor for the gift.