PSC650 – Philanthropy & Resource Development (ONLINE)
Spring 2017

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or feel free to e-mail me

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 main fundraising 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 a particular nonprofit organization and develop recommendations for its improvement;
• Gain a working knowledge of the philanthropic tradition, 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
(You are encouraged to obtain a hard copy as we use this book extensively during the semester. However, if you cannot afford purchasing the hardcopy, 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 books are available as the UNCG Library e-books:

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

Additional readings will be uploaded to the Canvas-Files.

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**COURSE FORMAT AND METHODS**

The weekly session runs Sunday through Saturday. In the beginning of each week, you will receive an announcement from me. You should carefully read it along with instructions in the Canvas-Modules to understand requirements for the week.

You are highly encouraged to share your ideas and findings relevant to the topics or nonprofit management with your classmates via e-mail or forum. Such additional contributions will be taken into consideration for your final course grade. Also, if you have any needs and interests in your career development, please inform me so that I can add relevant resources.

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**COURSE REQUIREMENTS AND POLICY**

All students are expected to participate in each session during the semester. You should plan to spend the same amount of time reading, completing assignments and participating in class and group discussion. No late assignments are allowed for the weekly forum posts, as they are treated as your in-class participation in a traditional face-to-face version of the course. In case any extenuating personal or work-related circumstances impact your participation and submissions of assignments, please contact me immediately.

All assignments must be your own work and original for this course. Students should follow appropriate guidelines in referencing the work of others. 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.

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**CANVAS RESOURCES**

Students are responsible for being familiarized to the Canvas and the online course environment. 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:
PARTNERSHIP WITH A NONPROFIT ORGANIZATION

In this highly practical course, you will work closely with an actual nonprofit organization ("partner nonprofit") as a group of students for your term project.

Your partner nonprofit may be an organization that you or your classmate/s already have a good relationship with or chosen from a list of organizations interested in working with our students. Please e-mail me to 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 as responsive and responsible as possible in your communications with your partner. You should discuss meeting schedules and requirements for your all assignments during your first meeting; 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

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<thead>
<tr>
<th>Assignments</th>
<th>% of Total</th>
<th>Grading Method</th>
<th>Due Date</th>
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<tbody>
<tr>
<td>Weekly forums</td>
<td>26%</td>
<td>260 points: 20 points (10 points/ “opinion post”; 10 points/min. 2 “response posts”) x 13 forums</td>
<td>Thursdays and Saturdays 10pm</td>
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<td>Class participation and contribution</td>
<td>16%</td>
<td>Grading criteria include the quantity (e.g., extra forum posts) and the exceptional quality of your forum posts, and additional contribution to class (e.g., providing studies relevant to class topics)</td>
<td>Ongoing</td>
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<td>Portfolio assignments</td>
<td>36%</td>
<td>360 points: 120 points x 3 assignments</td>
<td>2/26, 3/26 and 4/16, 11:59 pm</td>
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<tr>
<td>Final group paper and presentation</td>
<td>22%</td>
<td>Paper (120 points), presentation (80 points) and your response posts (min. 2) (20 points). An evaluation from the liaison of your partner nonprofit will form part of the grade.</td>
<td>The last weekly session</td>
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**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%)
******** Weekly Forums ********

Each week, there is a Weekly Reading Discussion Forum that runs in the following way. Please go to the Canvas-Discussions (you will find the link under the Canvas-Module) to participate.

Step 1) Sundays – Check an announcement from the instructor and find the weekly requirements and discussion questions in the Canvas-Module.

Step 2) By Thursdays 10:00 pm – Post your “opinion post” answering discussion questions.

Step 3) By Saturdays 10:00 pm – Post your “response posts” to at least 2 of other students’ opinions. NOTE: Please submit your opinion post first before responding to your classmates’ posts.

IMPORTANT NOTE FOR WEEKLY FORUM GRADE: No forum posts should be expected to get full points automatically. Your posts should be substantial by using key concepts from course readings and answer all discussion questions with explanation of reasons for your opinions (“you did a great job” is not considered as a thoughtful opinion.). No delayed Forum Posts are accepted for the grade. To get at least the partial grade for your posts, please submit your posts before the deadline. If you need more “substance” in your posts, I will inform you so that you know what you are expected to do for the next time.

******** Term Project Assignments ********

Your term project constitutes (1) Portfolio Assignments and (2) Final Paper and Presentation. You will team up with other 1~3 students for this project. You will (1) develop Portfolio Assignments individually (If you and your group members would like to work on Portfolio Assignments as a group, please talk to me); and (2) develop your Final Paper and Presentation as a group.

In general, your papers should follow an appropriate citation style (e.g., APA), except the sections for practical fundraising tools (e.g., a direct mail letter). There is no requirement for minimum or maximum page length, while your double-spaced paper is likely to need at least 5 or 6 pages to address important points. 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-Files-Module-Files.

1. Portfolio Assignments:

By Sunday 11:59 pm, please submit your portfolio assignment via the Canvas-Module-Assignments.

- Please find more details in the last section of this syllabus for the requirements for each portfolio.

NOTE: You will need to send your portfolio assignments to your partner nonprofit to receive feedback no later than the next day of the assignment due (or in a convenient timing that you and your partner nonprofit will have agreed upon).
2. Final Paper and Presentation:

**Final Paper:** You will develop your final paper by using feedback from me and your partner nonprofit. You may use your past portfolio assignment/s as a base to develop your final paper. However, your final paper must demonstrate how you elaborate the ideas that you initially develop for your portfolio assignments (i.e., how your final paper is different from your portfolio assignments.).

Your final paper needs to contain the following information:

- Start with an introduction stating (1) main objectives and (2) structure of your paper.
- Provide a brief explanation about (1) feedback you receive from your partner nonprofit and me; (2) how and in which section you elaborate your analysis and recommendations based on the feedback.
- Tell us about the fundraising program/s and strategy/-ies you find to be the most effective and appropriate one/s for your partner nonprofit. You should assess the efficiency and effectiveness of fundraising programs, based on analytical framework and key concepts from “fundraising audit” (Week 4 and portfolio assignment #1), and then explain why the selected fundraising program/s is/are the most appropriate.
- Explain how the recommended fundraising program/s should be executed. Examples are; those involved in fundraising (e.g., a fundraiser, board, and/or other volunteers), a time frame/fundraising calendar, feasibility, anticipated expenses, and/or a fundraising goal.
- Include “fundraising tools,” such as a letter, a prospect list and a fundraising campaign calendar, if appropriate.

**Final Presentation:** Based on your final paper, prepare a Powerpoint presentation to explain your partner nonprofit’s case for support, your assessment of why your approach is appropriate using elements from the course, and the specifics of the request(s) or recommendations your group has created. Please conclude your presentation with 1-2 slides for your “fundraising ask” (a specific amount and use of fund raised) on behalf of your partner nonprofit.

NOTE: Please provide your final paper and presentation material to your partner nonprofit as soon as you complete them (no need to ask for feedback for the final paper and presentation).

****** Class Participation and Contributions ******

You are expected to attend all class meetings and participate fully in course activities and discussion. Here are some guidelines for the participation grade in this course:

- Bring articles from newspaper and trade publications (e.g., Chronicle of Philanthropy) and introduce your findings in class.
- Interact with other course members and the instructor positively and volunteer positively to open questions.
- The quantity and quality of your active participation in class/group activities.
## COURSE SCHEDULE

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<thead>
<tr>
<th>Week</th>
<th>Module/Topic</th>
<th>Readings/Assignments (Subject to change)</th>
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<tbody>
<tr>
<td>Week 1</td>
<td>Introduction: What is Philanthropy?</td>
<td>Readings:</td>
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<tr>
<td>1/17 ~ 1/21</td>
<td></td>
<td>- Rosso “Ch. 1 A philosophy of fundraising”</td>
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<td>- Payton &amp; Moody “Introduction” (Library eBook)</td>
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<td>- Payton &amp; Moody “Social history” (Library eBook)</td>
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<td>- Wiepking &amp; Handy “Ch. 4 Giving in the United States” (Library eBook)</td>
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<td>- <em>Skim</em> - Rooney &amp; Nathan “Ch. 10 Contemporary dynamics of philanthropy”</td>
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<td>Week 2</td>
<td>Ethical Foundations of Fundraising</td>
<td>Reading:</td>
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<tr>
<td>1/22 ~ 1/28</td>
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<td>- Tempel “Ch. 35 Ethical frameworks for fundraising”</td>
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<td>- Purcell “Ch. 36 The law and fundraising”</td>
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<td><strong>Case Readings:</strong></td>
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<td>- Tracks WNET's Efforts to Soothe an Irate Donor</td>
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<td>- The New Yorker “A Word from Our Sponsor”</td>
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<td>- David Koch and PBS: The Odd Couple</td>
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<td><strong>Resources for Fundraising Laws in NC</strong></td>
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<td>- “Charitable solicitation - licensing, disclosures and acknowledgement”</td>
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<td>- “Incentive compensation for fundraising professionals”</td>
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<td>- NC Secretary of State Charitable Solicitation Licensing Section <a href="http://www.secretary.state.nc.us/csl/ThePage.aspx">http://www.secretary.state.nc.us/csl/ThePage.aspx</a></td>
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<td>Week 3</td>
<td>Giving Motivations and Behaviors</td>
<td>Readings:</td>
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<td>1/29 ~ 2/4</td>
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<td>- Mesch &amp; Pactor “Ch. 14 Women as donors”</td>
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<td>- Wagner “Ch. 16 Ethnicity and giving”</td>
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<td>- Brown &amp; Kou “Ch. 17 Giving differences among the generations”</td>
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<td>- Sargeant &amp; Shang “Ch. 4 Individual giving behavior” (Library eBook)</td>
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<td><strong>CANVAS Readings:</strong></td>
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<td>- Prince &amp; File “Seven faces of philanthropy” (Read pp. 13-16)</td>
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<td>- Center on Philanthropy “Understanding donors’ motivations: Executive summary” (Read pp. 4-7)</td>
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<td>- AFP diversity essay</td>
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<td><strong>Reading required for MPA students (for the forum discussion):</strong></td>
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<td>- Choose one scholarly article from the CANVAS Resource folder</td>
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| Week 4  2/5 ~ 2/11 | Fundraising Audit and Case | **Readings:**  
- Seiler “Ch. 2 Plan to succeed”  
- *Skim* - Seiler “Ch. 3 Developing a consistency for fundraising”  
- Seiler “Ch. 4 Developing and articulating a case for support”  

**CANVAS/eBook Readings:**  
- Sargeant & Jay “The fundraising audit”  
- Giving USA Highlights  
- *Reading for MPA students* – Gittell & Tebaldi “Charitable giving: Factors influencing giving in U.S. States”  

**Resources for Case for Support:**  
- Case Preparation/Evaluation Checklist  
- Case for Support examples  

| Week 5  2/12 ~ 2/18 | The Total Development Plan | **Readings:**  
- Seiler “Ch. 5 Total development plan”  
- Rosso “Ch. 6 The annual fund”  
- Crossnickle “Ch. 24 The trustee’s role in fundraising”  
- Elkas “Ch. 27 Managing the fundraising program”  

**CANVAS/eBook Readings:**  
- *Reading for MPA students* – Boenigk & Scherhag “Effects of donor priority strategy on relationship fundraising outcomes”  

**Resources for Fundraising:**  
- Nonprofit Research Collaborative  
  [http://www.npresearch.org/findings.html](http://www.npresearch.org/findings.html)  

| Week 6  2/19 ~ 2/25 | Annual Fund Programs | **Portfolio Assignment 1 Due (Sunday 2/26, 11:59 pm) – Please share it with your partner nonprofit for feedback**  

**Readings:**  
- Warwick “Ch. 19 Direct mail marketing”  
- Purvis “Ch. 22 Telephone solicitation”  

**CANVAS/eBook Readings:**  
- Goering et al. “Persuasion in fundraising letters: An interdisciplinary study”  

**Resources for Fundraising Letter:**  
- Fundraising letter examples
### Week 7
#### 2/26 ~ 3/4
**Special Events and Grassroots Fundraising**

**Readings:**
- Klein “Ch. 34 Fundraising for grassroots nonprofits”

**CANVAS/eBook Readings:**
- Cox “Ch. 19 Fundraising events” (from Sargeant & Shang book)

**Resources for Special Events:**
- Special event ideas and examples

### Week 8
#### 3/5 ~ 3/11
**Technology in Fundraising: ePhilanthropy and Prospect Research**

**Readings:**
- Martin “Ch. 11 Prospect research”
- Stranger “Ch. 20 E-Mail and internet solicitation”
- *Skim* - Love “Ch. 26 Using social media to energize and mobilize your volunteers”
- Lindauer “Ch. 30 Donor database management and segmentation”

**CANVAS/eBook Readings:**
- Saxton & Wang “The social network effect: The determinants of giving through social media”
- *Skim* - AFP “Social media guideline”
- *Optional* - Convio “Using the Internet to raise funds and build donor relationships” (*Read pp. 17-21*)

#### 3/12 ~ 3/18
**NO CLASS (Spring Break)**

### Week 9
#### 3/19 ~ 3/25
**Major Gifts and Capital Campaigns**

**Portfolio Assignment 2 Due (Sunday 3/26, 11:59 pm) – Please share it with your partner nonprofit for feedback**

**Readings:**
- Pierpont “Ch. 8 Capital campaigns”
- Heil & Bate “Ch. 15 High-net-worth donors”
- Gattle “Ch. 18 Personal solicitation”
- *Skim* – Maxwell “Ch. 33 Selecting and working with fundraising consultants”

**CANVAS/eBook Readings:**
- Schervish “The moral biography of wealth”
- *Optional* - 2014 U.S. Trust study of high net worth philanthropy (summary)

**Resources for Major Gifts and Capital Campaigns:**
- Acknowledge letter examples
- *Optional* – Campbell “Capital campaign funding study”
| Week 10 3/26 ~ 4/1 | Planned Giving | Readings:  
- Regonovich “Ch. 9 Establishing a planned giving program”  

**CANVAS/eBook Readings:**  
- Partnership for Philanthropic Planning (PPP) “Are you ready for planned giving?”  
- *Skim* - Partnership for Philanthropic Planning “Model standards of practice for the charitable gift planner”  

**Resources for Planned Giving:**  
- Partnership for Philanthropic Planning (PPP)  
  [http://www.pppnet.org/](http://www.pppnet.org/)  

**Study Guide:**  
- Lecture videos from LEAVE A LEGACY

| Week 11 4/2 ~ 4/8 | Corporate and Foundation Giving | Readings:  
- Davis “Ch. 13 Foundation fundraising”  

**CANVAS/eBook Readings:**  
- Burlingame & Sargeant “Corporate giving and fundraising” (from the Sargeant & Shang book)  

**Resources for Corporate and Foundation Fundraising:**  
- Sample inquiry letters and proposals  
- A list of foundation and corporate donor research recourses and databases  
- Video: How to get corporate sponsors to love you

| Week 12 4/9 ~ 4/15 | Performance Evaluation and Effective Fundraising | **Portfolio Assignment 3 Due (Sunday 4/16, 11:59 pm) – Please share it with your partner nonprofit for feedback**  

**Readings:**  
- Greenfield “Ch. 31 Budgeting for fundraising and evaluation performance”  

**CANVAS/eBook Readings:**  
- Draper “100% goes to charity?”  
- Urban Institute & Center on Philanthropy “Nonprofit overhead cost project brief No. 3”

**Resources for Fundraising Cost and Effectiveness:**  
- Charity watchdogs: Charity Navigator, BBB Wise Giving Alliance,
Description of Portfolio Assignments

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

1) Fundraising Audit and Case Preparation (Week 4): (1) Summarize what external and internal factors may affect the organization’s fundraising activities in a brief report (2-3 pages, single-spaced). Considering macro and micro factors affecting your partner nonprofit, what may be a strong case your partner nonprofit can make? (2) Based on findings from your auditing, write a case statement (revise the existing one if any) for your organization’s annual fund programs. **NOTE:** Please do NOT copy descriptions in your partner nonprofit’s existing materials (e.g., the website) and use them for your paper.

2) Assessment of Total Development Program (Week 5): By using some frameworks from “The Total Development Plan,” and other readings and resources, such as Nonprofit Research Collaborative Nonprofit Fundraising Study, assess your nonprofit’s total development program. Write a brief report (2-3 pages, single-spaced) to explain the findings and make any recommendations for how their development program can be improved. Your report should address some of the following questions.
  • What are the donor segmentations (e.g., individuals, foundations, corporations) and revenue profile of the organization?
  • What programs does the organization use for fundraising? (e.g., donor acquisition, renewal, upgrade, major gifts, planned giving, capital campaigns) Was it successful?
  • Does your organization conduct an annual fund? What fundraising strategies are used? (e.g., direct mail, telemarketing, ePhilanthropy, special events)

*************** Portfolio Assignment 2 ***************
3) **Direct Mail Letter** (Week 6): Write a direct mail letter or an electric appeal asking for annual fund gifts to your organization. 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. **NOTE:** Your letter should be addressed to **individual** donors, as we have an inquiry letter to a corporate/foundation donor as a different assignment.

4) **Annual Fund Strategies of Expanding a Donor Base** (Weeks, 6, 7, and 8): 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.

5) **Solicitation and Stewardship Plan** (Week 9): Prepare a brief report (2 pages, single-spaced) for effective solicitation for a prospective major donor and stewardship strategies that your partner nonprofit can utilize to approach their major donor (or capital campaign or planned giving) prospect. Who are the solicitors? What are objections and possible questions which the prospective donor may ask? How much would they ask for, and for what? Your report will also include your recommendations for appropriate way to acknowledge and steward a donor for the gift.
*********** Portfolio Assignment 3 ***********

6) Test for Capital Campaign and/or Planned Giving Readiness (Weeks 9 and 10): This assignment requires you to do one of the following:

- Using the criteria from Chapter 8 of the textbook, “Capital Campaigns,” write several paragraphs explaining the readiness of the organization to conduct a capital campaign. Things you may want to touch on include key strengths, available leadership, and other indicators that the nonprofit can confidently begin a capital campaign. If you believe there is a lack of organizational readiness to conduct a campaign, write several paragraphs explaining weaknesses, areas of concern, and other factors that indicate the organization is not ready to begin a campaign.

Or

- If your organization has completed a capital campaign within the past 15 months, write several paragraphs describing the campaign’s results. Include analyses of the factors that contributed to the campaign’s success, such as volunteer leadership, lead gifts, and others. If the campaign was considered unsuccessful, explain why. Analyze what contributed to the lack of success. The criteria in Chapter 8 of the textbook, “Capital Campaigns,” will provide a helpful guide as you analyze the campaign’s results.

Or

- Evaluate your organization’s planned giving program -- how effective is it? How can it be expanded? Improved?

Or

- If your organization is not currently involved in planned giving, design a start-up planned giving program for the organization.

7) Corporate or Foundation Inquiry Letter and Fundraising Strategies (Week 11): Use available resources and identify foundation and/or corporate prospects for your partner nonprofit. List the ones you review. Identify one as the most likely prospect (based on the analysis on linkage and interest) and prepare a brief report (approx. 2 pages) 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.