

Principles of Fundraising & Resource Development

INTS 431-003, Fall 2019

When: Mondays, 7:20-10:00pm

Where: Fairfax Campus, West Building 1001

Who: Prof. Julie Trkula

Contact: jtrkula@gmu.edu, 703-993-5777

Office hours: by appointment

Introduction

This course is designed to maximize individual learning through an academic and real-world application of fundraising principles. Students will obtain a thorough understanding of nonprofit revenue sources and gain practical knowledge to demonstrate fundraising and resource development skills and acumen. The class format will vary to include regular discussion of readings, student presentations, written assignments, and outside the classroom experiences. All students are expected to participate fully in all course requirements and exhibit a high level of engagement in classroom discussions. Outside of class, students will be expected to complete at least 25 hours of community-based service learning through volunteer activities and fundraising assistance for a nonprofit organization. There is a requirement for other “outside the classroom” involvement described in this syllabus. Accountability for these hours is demonstrated via a tracking log that will need to be initialed by supervisors and turned in at the end of the semester.

Learning Objectives

Through this course, students will:

- Learn how philanthropy differs from charity
- Understand the importance of philanthropy in our society
- Evaluate the merits of different fundraising techniques
- Broaden their knowledge of fundraising as a profession
- Help develop and/or analyze a fund development plan
- Apply a range of principles, techniques, and tools to solve practical fundraising problems
- Analyze and evaluate the fundraising strategy of a particular nonprofit organization and develop recommendations for its improvement.
- Partner with a nonprofit to do fundraising activities, and participate in a fundraising event

Texts and Resources

Eugene R. Tempel, Timothy L. Seiler, and Dwight F. Burlingame, eds., *Achieving Excellence in Fundraising*. 4th edition. San Francisco: Jossey-Bass/Wiley, 2016. ISBN: 978-1-118-85382-5.

Other online resources, see course schedule, attached.

Inclusive Learning

Your success in this class is important to me. We all need accommodations because we all learn differently. If there are aspects of this course that prevent you from learning or exclude you, please let me know as soon as possible. Together we'll develop strategies to meet both your needs and the requirements of the course.

I encourage you to visit the Office of Disability Services to determine how you could improve your learning as well. If you need official accommodations, you have a right to have these met. There are also a range of resources on campus, including the Writing Center, Tutoring Center, and Academic Advising Center.

Similarly, I see our class as an *intentionally* inclusive community where we will work together and respect each other in order to create the best learning environment. This respect extends to refraining from plagiarism and other behavior that is prohibited by the GMU Honor Code. If you have any questions about whether something constitutes plagiarism or another violation, reach out to me before you turn in the assignment.

Learning Services (within Counseling and Psychological Services)

Offers academic skills and self-development workshops throughout the semester. For more information, call (703) 993-2999 or go to caps.gmu.edu/learningservices. Attending one of these workshops can be counted towards an Outside Event, with proper registration and verification.

Students with Disabilities

If you are a student with a disability and you need academic accommodations, please let me know at the first class meeting. All academic accommodations for students with disabilities must be arranged through the Office for Disability Services, (703) 993-2474 or ods.gmu.edu.

Writing Intensive

The Faculty Senate Writing Across the Curriculum Committee has approved this course to fulfill all/in part of the Writing Intensive ("WI") requirement for the Integrative Studies major.

Electronic Devices and Learning

We will occasionally need access to the internet for classwork and notes. Please bring your laptops to class each week, fully charged. Silence all cell phones and keep them packed away. No messaging or social media in class; please step out of the classroom if you need to make a call or send a message. This class is a very interactive class that requires all students to participate and be engaged. We will take a break in the middle of class each week, at approximately 8:30 pm. If you are caught using social media or messaging in class, you will be excused for the day and lose respective participation points.

Notice of Mandatory Reporting

As a faculty member, I am designated as a "Responsible Employee," and must report all disclosures of sexual assault, interpersonal violence, and stalking to Mason's Title IX Coordinator per University Policy 1412. If you wish to speak with someone confidentially, please contact one of Mason's confidential resources, such as the Student Support and Advocacy Center (SSAC) at 703-993-3686 or Counseling and

Psychology Services (CAPS) at 703-993-2380. You may also seek assistance from Mason's Title IX Coordinator by calling 703-993-8730 or emailing cde@gmu.edu

Food and Drink

You may bring drinks and snacks to class, provided that they are not loud or disruptive. Please be courteous with extraneous noises or smells associated with what you bring to class. The instructor retains the right to rescind this policy if it is violated or becomes problematic.

Emergency Procedures

Be aware of your surroundings and note the emergency exits and shelter in place locations in the classroom and around campus. Make sure to review <https://ehs.gmu.edu/emergencymanagement/plans-guides/> to understand and know how to respond in campus and community emergencies.

Syllabus

You should consider this syllabus as your contract for the course. You must follow the directions for each assignment and ensure that you submit your work on time. This class can be successfully completed if you manage your time effectively, come to class prepared, and turn in work in a timely and high quality fashion. These are behaviors that will enable you to be successful in your other classes as well.

Course Assessment

Your grade will be calculated out of 100 points, with the following grade divisions:

97-100= A+

93-96.9 = A

90-92.9 = A-

87-89.9 = B+

83-86.9 = B

80-82.9 = B-

77-79.9 = C+

73-76.9 = C

70-72.9 = C-

60-69.9 = D

0-59.9 = F

University Policies and Resources

Honor Code - <http://oai.gmu.edu/honor-code/>

This class operates in accordance with the University Honor Code, stated as follows:

*“To promote a stronger sense of mutual responsibility, respect, trust, and fairness among all members of the George Mason University community and with the desire for greater academic and personal achievement, we, the student members of the university community, have set forth this honor code: **Student members of the George Mason University community pledge not to cheat, plagiarize, steal, or lie in matters related to academic work.**”*

All suspected honor code violations will be reported to the honor committee for appropriate action.

Code of Student Conduct -

<http://studentconduct.gmu.edu/university-policies/code-of-student-conduct/>

Underlying the University’s mission are basic values which must be respected if these goals are to be achieved. These indispensable community values include:

- The importance of personal integrity.
- The right of every individual to be treated with respect and dignity.
- The freedom of intellectual inquiry in the pursuit of truth.
- The freedom of speech and open exchange of ideas.
- The acceptance and appreciation of diversity.
- The freedom from discrimination on the basis of gender, religion, sexual orientation, age, disability, ethnicity, and political views.
- The freedom from violence aimed at limiting freedom, interfering with, or disrupting university activities.

Assignments and Grading

See Blackboard for full details for each assignment. Assignments are due before class (must be submitted **before** 7:20 pm) on their due date. See course schedule attachment for due dates.

1. **Full Participation** -15 points

Learning in this class will come from books, the instructor, as well as each other which is why it is expected and imperative that students attend all class sessions, arrive on time, and be prepared and willing to share ideas, questions, and opinions about the readings and assignments. If at all possible, students should email the instructor beforehand if they expect to be late or miss class entirely. Participation can also be determined through quizzes and questions posed in class on course material being covered.

2. **Non Profit Organization Selection** (for fundraising study and volunteerism)- 5 points

Throughout this course, you will work on various assignments that require you to know background information, make proposals, present on topics, and obtain volunteer hours. Making an educated selection of a non profit organization that you would like to work with is crucial for your success in this course. For this assignment, you will review 5-10 non profit organizations that you are interested in working with, as well as your notes on each organization. You must contact the organization and receive

written approval that are able to provide you the information necessary to do your coursework, as well as allow you to do your 25 hours of fundraising volunteer work with them, with the understanding that you will need to have this completed by December 2, 2019. You must write a 250 word paper (1 page, double spaced) describing the organization you selected. You must also include proof of the written approval, as well as your notes on the other organizations that you researched. You will likely need to submit multiple documents to Blackboard.

Portfolio Assignments:

Throughout the course of the semester, you will work to build a portfolio on the non profit that you selected. These assignments will typically be short, 1-3 page assignments that you will build a strong resource development packet about your selected organization. More detailed information will be available on Blackboard for each assignment.

3. Portfolio Assignment #1- Gift Profile- 5 points

4. Portfolio Assignment #2- Mission Statement Evaluation- 5 points

5. Portfolio Assignment #3- Foundation (Grant) Letter of Inquiry (LOI)- 5 points

6. Portfolio Assignment #4- Case Statement and Gift Range Chart for Annual Fund-5 points

7. Portfolio Assignment #5- Direct Mail Letter-5 points

8. Portfolio Assignment #6- Donor Thank You Letter- 5 points

9. Final Portfolio Assignment #7- Fundraising Analysis Paper, Assessment of Total Development Program (Final Paper)- 15 points

10. Non Profit Hours Log & Class Reflection Paper- 20 points

11. Final Presentations- 15 points

Assignment Policies

All assignments, unless otherwise noted, should be turned in on Blackboard. I will not accept assignments via email, hard copy, etc. Late work will NOT be accepted. If you have a problem meeting a deadline, contact me **before the assignment is due**. Arrangements made after the due date will not be accepted.

Writing Policies

All papers must be written in Times New Roman, Arial, or Calibri font, double spaced, size 12, with 1" margins. You must cite your sources, and use APA format. You are expected to use correct grammar, spelling, and style.

Course Schedule (subject to change at instructor's discretion)

Date	Week	Topic	Readings/Videos (Read by class each day)	Assignments Due
8/26	1	Welcome and Course Overview	none	
9/2	2	BREAK	BREAK--Labor Day Holiday	
9/9	3	Philanthropy	The Importance of Criticizing Philanthropy <i>Achieving Excellence in Fundraising, 4th Edition:</i> Chapter 1: A Philosophy of Fundraising Chapter 2: The Joy of Giving Chapter 6: Contemporary Dynamics of Philanthropy	Non Profit Organization Selection
9/16	4	Audience and Message	William Landes Foster, Peter Kim, & Barbara Christiansen: " Ten Nonprofit Funding Models ," Stanford Social Innovation Review, (Spring 2009), pp. 32-39. Watch: Peter Singer's The Why and How of Effective Altruism <i>Achieving Excellence in Fundraising, 4th Edition:</i> Chapter 4: Developing and Articulating a Case for Support Chapter 5: Individuals as a Constituency for Fundraising	Gift Profile
9/23	5	Planning	Watch Dan Pallotta, The Way We Think about Charity is dead Wrong <i>Achieving Excellence in Fundraising, 4th Edition:</i> Chapter 3: Plan to Succeed Chapter 4: Developing and Articulating a Case for Support	Mission Statement Assignment

9/30	6	Grants	<p><i>Achieving Excellence in Fundraising, 4th Edition:</i></p> <p>Chapter 8: Corporate Giving and Fundraising Chapter 9: Foundation Grantmaking and Fundraising</p> <p>“Grant Writing in the Age of Collaboration,” by Susanne Carter http://www.susannecarter.com/uploads/1/3/0/2/13028230/grant_writing_in_the_age_of_collaboration.pdf</p>	
10/7	7	The Annual Fund & Total Development Plan	<p><i>Achieving Excellence in Fundraising, 4th Edition:</i></p> <p>Chapter 17: The Total Development Plan Built on the Annual Fund Chapter 7: Prospect Research and Database Management Chapter 26: Personal Solicitation</p>	Foundation/Grant LOI
10/15 TUES	8	Major Gifts & Capital Campaigns	<p><i>Achieving Excellence in Fundraising, 4th Edition:</i></p> <p>Chapter 18: Major Gifts Chapter 19: Capital Campaigns</p>	Case Statement and Gift Range Chart for Annual Fund
10/21	9	Phone/Mail	<p><i>Achieving Excellence in Fundraising, 4th Edition:</i></p> <p>Chapter 27: Direct Response Chapter 28: Telephone Solicitation and Stewardship</p>	
10/28	10	Online	<p><i>Achieving Excellence in Fundraising, 4th Edition:</i></p> <p>Chapter 14: Generational Differences in Giving Chapter 29: Digital Fundraising</p>	Direct Mail Letter
11/4	11	Thanking and Keeping Your Donors & Working With Volunteers	<p><i>Achieving Excellence in Fundraising, 4th Edition:</i></p> <p>Chapter 31: Stewardship and Accountability Chapter 33: Volunteer Management</p>	

11/11	12	Ethics	<i>Achieving Excellence in Fundraising, 4th Edition:</i> Chapter 34: Ethics and Accountability <ul style="list-style-type: none"> • Something from BBB 	Donor Thank You Letter
11/18	13	Special Events	<i>Achieving Excellence in Fundraising, 4th Edition:</i> Chapter 30: Special Events	
11/25	14	Presentation Day	none	Fundraising Analysis Paper, Assessment of Total Development Program (Final Paper) Final Presentation Slides
12/2	15	Presentation Day	none	Non Profit Hours Log & Class Reflection Paper
12/16	Final		[do not meet]	Have a wonderful winter break-- Good luck on final exams!