

**PSC650-01 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 philanthropy and fundraising—history, values, roles in society and human lives, understanding donors' giving motivation, preparation of the case for support, implementation of relevant strategies and techniques, assessment of potential sources of support, 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**

**Main textbooks:**

We will use two different editions of *Achieving excellence in fundraising*. (You are encouraged to obtain a hard copy of the 4<sup>th</sup> edition)

Tempel, E.R., Seiler, T.L., & Burlingame, D.B. (eds.). (2016). *Achieving excellence in fundraising*. 4<sup>th</sup> Edition. Hoboken, NJ: John Wiley & Sons.

<https://ebookcentral-proquest-com.libproxy.uncg.edu/lib/uncg/detail.action?docID=4189539>

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

[https://ebookcentral-proquest-com.libproxy.uncg.edu/lib/uncg/detail.action?docID=624350#goto\\_toc](https://ebookcentral-proquest-com.libproxy.uncg.edu/lib/uncg/detail.action?docID=624350#goto_toc)

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

Breeze, B., & Moody, M. P. (2016). *The philanthropy reader*. Abingdon, Oxon; New York, NY.

<https://www-taylorfrancis-com.libproxy.uncg.edu/books/9781317447900>

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

<https://ebookcentral-proquest-com.libproxy.uncg.edu/lib/uncg/detail.action?docID=348670>

Sargeant, A., & Shang, J. (2017). *Fundraising principles and practice*. 2<sup>nd</sup> Edition. Hoboken, NJ: John Wiley & Sons.

<http://onlinelibrary.wiley.com.libproxy.uncg.edu/book/10.1002/9781119228974>

**Recommended books available as the UNCG Library e-books:**

Petty, 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/detail/detail?vid=0&sid=b93b5f94-aaac-44e0-8631-64b6678cae62%40sessionmgr4009&bdata=JnNpdGU9ZWVhc3QtbGl2ZQ%3d%3d#AN=23185&db=nlebk>

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

<http://web.b.ebscohost.com.libproxy.uncg.edu/ehost/detail/detail?vid=0&sid=53b8208d-6dfd-4ca0-bd9c-e2b3fb4179aa%40pdc-v-ssessmgr01&bdata=JnNpdGU9ZWVhc3QtbGl2ZQ%3d%3d#AN=1020383&db=nlebk>

## 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/4210/1/141852-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
Term Project	60% total	
Portfolio Assignments (individual)	(45%)	15% (150 points) for each assignment
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
Philanthropy Analysis/ Giving Motivation Paper	15%	
Oral Presentation	10%	
Class Participation	15%	Main grading criteria includes your class preparation assignments and philanthropy autobiography journal.
<b>TOTAL</b>	<b>100%</b>	

**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.

**WEEK 1**                      **TOPIC 1) INTRODUCTION: WHAT IS PHILANTHROPY?**  
**1/10**

**Decide your nonprofit partner and team for the term project**

**Class-Prep Assignment:** A short summary of (1) 5 ideas/definitions of philanthropy that you have found the most intriguing in the assigned readings and (2) your “philanthropic autobiography” responding to the following questions: (a) Where and how do you develop your interest in philanthropy?; (b) What values can explain your philanthropic actions?; (c) How may ideas from the assigned readings help continue to develop your philanthropic autobiography (e.g., what philanthropic actions are you planning to take in this semester and/or future?). ***Please bring a hardcopy of the summary to share with your classmate/s during discussion.***

**Readings:**

*Achieving Excellence in Fundraising Principles (AEFP) 4<sup>th</sup> ed.*

- Rosso “Ch. 1 A philosophy of fundraising”
- Burlingame & Janin “Ch. 6 Contemporary dynamics of philanthropy”

*Library eBook/Canvas (CV) readings*

- Payton & Moody (eBook) “Introduction” and “Social history” (CV)
- Moody & Breeze (eBook)
  - Ilchman et al. “Philanthropy in the world’s traditions”
  - Frumkin “Strategic giving for public and private value”
  - Sulek “On the classical and modern meanings of philanthropy” (Original articles recommended for MPA students and master/doctoral students – Sulek “On the Modern Meaning of Philanthropy” and “On the Classical Meaning of Philanthrôpía (CV))
  - Zunz “Philanthropy’s place in American history”
  - Seneca “On benefits”
  - Maimonides “Eight level of giving”
- Aristotle “Generosity, extravagance, and stinginess” in *Nicomachean Ethics* (CV)

**WEEK 2**                      **TOPIC 2) EXPLAINING PHILANTHROPY: DIFFERENT THEORETICAL**  
**1/17**                              **LENSES AND RATIONALES**

*Guest speaker:* W. Noah Reynolds, CPA, MBA, Coleman Entrepreneur in Residence

**Class-Prep Assignment:** A short summary of (1) 5 key concepts of theories that you have found the most intriguing in the assigned readings and (2) your ideas of how these theories can be applied to explaining your own philanthropic values and fundraising/philanthropy in general.

**Readings:**

*Library eBook/Canvas readings*

- Moody & Breeze (eBook):
  - Burlingame “Philanthropy is not the same as altruism”
  - Andreoni “The economic explanation of philanthropy,”
  - Reich “A political theory of philanthropy”

- Wuthnow “A cultural explanation of compassion”
- Smith & Davidson “How generosity enhances well-being”
- Okasha, “Biological Altruism”
- Bekkers & Wiepking “Eight mechanisms that drive charitable giving
- Ostrander & Schervish “Giving and getting”
- Salamon “The revolution on the frontiers of philanthropy”
- Prince & File *Seven faces of philanthropy* (CV)

---

**WEEK 3                      TOPIC 3) FUNDRAISING AUDIT AND CASE**

**1/24**

Guest Speaker: Michelle Schneider, Senior Counsel, CapDev

**Class-Prep Assignment:** (1) A summary of concrete examples of “PEEST” factors that may affect your nonprofit fundraising (Please find details about PEEST factors in Sargeant & Jay chapter) and (2) case for support of your partner nonprofit, if any. Use resources listed in Huehls “Resources for strengthening fundraising” in *AEFP* and those listed below to find information relevant to PEEST factor (for your Portfolio Assignment #1).

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

**Readings:**

*AEFP* 4<sup>th</sup> ed.:

- Seiler “Ch. 3 Plan to succeed”
- Seiler “Ch. 4 Developing and articulating a case for support”
- Seiler “Ch. 5 Individuals as a constituency for fundraising”
- Huehls “Ch. 37 Resources for strengthening fundraising”

Library eBook/Canvas readings

- Sargeant & Jay “The fundraising audit” (CV)
- *The Chronicle of Philanthropy* “Nonprofits must move swiftly to fight for sound public policies”

**Resources for PEEST factors:**

- Chronicle of Philanthropy ([www.philanthropy.com](http://www.philanthropy.com))
- Nonprofit Times ([www.thenonproffitimes.com](http://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*)
- For charitable taxes and policies – check the websites of Independent Sector, Alliance for Charitable Reform, National Council of Nonprofits, Charitable Giving Coalition, Council on Foundations

---

**WEEK 4                      TOPIC 4) THE TOTAL DEVELOPMENT PLAN**

**1/31**

**Student Presentations:** Using data and evaluation tools to develop strategies for effective fundraising

**Class-Prep Assignment:** Bring any available data about your partner nonprofit’s (or any other nonprofit’s) current fundraising activities and donor profiles (e.g., the number of individual, corporate, and/or foundation

---

donors) with a brief summary of your findings. If you cannot obtain information from the organization, please bring available resources, such as website, annual report, and Form 990, to class (for your Portfolio Assignment #1).

**Readings:**

AEFP 4<sup>th</sup> ed.

- Tempel & Seiler “Ch. 32 Engaging the board in fundraising”
- Tempel “Ch. 34 Ethics and accountability”
- Skim - Purcell “Ch. 35 The law and fundraising”

AEFP 3<sup>rd</sup> ed.

- Seiler “Ch. 5 Total development plan”
- Rosso “Ch. 6 The annual fund”
- Elkas “Ch. 27 Managing the fundraising program”

**Possible Readings Assigned for Student Presentation:**

- *Giving USA Highlights* (CV)
- AFP Fundraising Effectiveness Project (<http://afpfep.org/reports/>)
- Blackbaud Institute (<https://institute.blackbaud.com>)
- Nonprofit Research Collaborative (<http://npresearch.org>)

---

<b>WEEK 5</b> <b>2/7</b>	<b>TOPIC 5) ANNUAL FUND (1) DIRECT MAIL AND TELEPHONE SOLICITATION</b>
-----------------------------	--

---

\*\*\*\*\* Portfolio Assignment #1 Due \*\*\*\*\*

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

**Class-Prep Assignment:** Bring (1) a list of questions for the guest speaker (email me in advance or bring a hardcopy) and (2) a copy of a solicitation letter of your partner nonprofit, if any (for your Portfolio Assignment #2).

**Readings:**

AEFP 4<sup>th</sup> ed.

- Eschenbacher “Ch. 27 Direct response”
- Nathan “Ch. 28 Telephone solicitation and stewardship”

AEFP 3<sup>rd</sup> ed.

- Reread - Rosso “Ch. 6 The annual fund”

Library eBook/Canvas readings

- 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)

---

<b>WEEK 6</b> <b>2/14</b>	<b>TOPIC 6) ANNUAL FUND (2) (SPECIAL EVENTS AND E-PHILANTHROPY)</b>
------------------------------	---

---

**Student Presentations:** Optimizing the power of digital fundraising (e.g., social media used for events, crowdfunding, and peer-to-peer fundraising)

**Class-Prep Assignment:** Bring (1) a draft of your special events idea (the check-sheet and examples will be

---

provided as a guideline) and (2) your partner nonprofit's digital fundraising tools (e.g., email appeals, social media) (for your Portfolio Assignment #2).

**Readings:**

AEFP 4<sup>th</sup> ed.

- Stranger “Ch. 29 Digital fundraising”

AEFP 3<sup>rd</sup> ed.

- Stranger “Ch. 20 E-Mail and internet solicitation” – read pp. 237-242 (from the beginning to the subsection ‘Twitter’ in the section “Internet-Based Fundraising Tools”)
- Klein “Ch. 34 Fundraising for grassroots nonprofits”

Library eBook/Canvas readings

- Sargeant & Shang (eBook) – Cox “Ch. 19 Fundraising events”; Sargeant & Shattuck “Ch. 11 Digital fundraising”
- AFP “Social media guideline” (CV)
- NY Times “Social Networks Meant for Social Good, but at a Price”

**Possible Readings Assigned for Student Presentation:**

- Sargeant & Shang (eBook) -- Shattuck & Sargeant “Ch. 12 Social media”
- Idealware. “A few good tools for peer-to-peer fundraising”
- #GivingTuesday “2017 Case studies”
- *The Chronicle of Philanthropy* “Learn from charities making the most of digital giving”; “Facebook ends transaction fees for donations, putting more dollars into nonprofit coffers”

---

**WEEK 7**                      **TOPIC 7) CORPORATE AND FOUNDATION GIVING**  
**2/21**                              **\*\*\*\*\* Portfolio Assignment #2 Due\*\*\*\*\***

**Student Presentations:** Case studies for identifying corporate donors and developing collaboration strategies (and how to avoid potential risks)

**Class-Prep Assignment:** TBA

**Readings:**

AEFP 4<sup>th</sup> ed.

- Nathan & Lesem “Ch. 9 Foundation fundraising”

Library eBook/Canvas readings:

- Sargeant & Shang (eBook) “Corporate giving and fundraising”
- Moody & Breeze (eBook)
- Fleishman “What foundations do”
- Friedman “The social responsibility of business is to increase its profits”

---

**WEEK 8**                      **TOPIC 8) MAJOR GIFTS AND CAPITAL CAMPAIGNS**  
**2/28**

Guest Speaker: Timothy A. Minor, Vice President, University Advancement, The University of North Carolina System

**Class-Prep Assignment:** Bring (1) a list of the reasons why and how the wealthy donors give according to the assigned readings and (2) take a “Fundraising Personality Test” (<https://askingmatters.com/find-your-style/>) and a list of 2-3 ideas about what fundraising style may be suited to your personality based on the readings (for your Portfolio Assignment #3).

---



**Readings:**

AEFP 4<sup>th</sup> ed.:

- Reread - Rosso “Ch. 1 A philosophy of fundraising”
- Rooney & Osili “Ch. 15 Understanding high net worth donors”
- Hodge “Ch. 18 Major gifts”
- Conley “Ch. 19 Capital campaigns”
- *Skim* - Maxwell “Ch. 25 Selecting and working with fundraising consultants”

AEFP 3<sup>rd</sup> ed.:

- Gattle “Ch. 18 Personal solicitation”

Library eBook/Canvas readings:

- Lagasse “What makes a fundraiser?” (CV)
- Moody & Breeze (eBook)
  - Schervish “Why the wealthy give”
  - Carnegie “The gospel of wealth”
  - Gates “Caring and complexity”
- 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)

---

**3/7 NO CLASS (Spring Break)**

---

**WEEK 9 TOPIC 9) PLANNED GIVING**  
**3/14 \*\*\*\*\* Portfolio Assignment #3 Due\*\*\*\*\***

Guest Speaker: David Landers, J.D., Director of Planned Giving, UNCG

**Class-Prep Assignment:** Bring a copy of your ALL portfolio assignments. You and your team members will decide whose portfolio assignments (all or selected) will be used for the final paper and shared with your partner nonprofit.

**Readings:**

AEFP 4<sup>th</sup> ed.

- Regonovich “Ch. 20 Establishing a planned giving program”

Library eBook/Canvas readings

- Sargeant & Shang (eBook) – Routley & Sargeant “Ch. 15 Bequest, in memoriam, and tribute giving”
- Partnership for Philanthropic Planning “Becoming an effective listener”
- Partnership for Philanthropic Planning “Model standards of practice for the charitable gift planner”

---

**WEEK 10 TOPIC 10) GIVING MOTIVATIONS AND BEHAVIORS**  
**3/21**

Guest Speaker: Susan Schwartz, Executive Director, The Cemala Foundation

**Class-Prep Assignment:** (1) Prepare questions for our guest speaker (about foundations), (2) ask your partner nonprofit if they are interested in cultivating any donor groups that the assigned readings discuss, and (3) bring a draft of the Giving Motivation/Philanthropy Analysis Paper (at least the annotated bibliography section)

**Readings:**

AEFP 4<sup>th</sup> ed.



- Mesch & Pactor “Ch. 10 Gender and philanthropy”
- Dale “Ch. 11 Inclusive philanthropy: Giving in the LGBT community”
- King “Ch. 12 Faith and giving”
- Osili & King “Ch. 13 Ethnic diversity and giving”
- Thayer & Feldmann “Ch. 14 Generational differences in giving”
- Wagner “Ch. 16 Global and cross-cultural fundraising”

**Possible Readings Assigned for Student Presentation:**

- Smith et al., *Philanthropy in communities of color* (eBook)
- 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.

---

**WEEK 11**      **TOPIC 11) MPA SPEAKER EVENT**  
**3/28**

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

No readings required.

---

**WEEK 12**      **TOPIC 12) PROSPECT RESEARCH AND DONOR RETENTION**  
**4/4**

Guest Speaker: Kathy Mills, Senior Donor Identification Analyst, Office of Development and Alumni Affairs, Wake Forest Baptist Medical Center

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

**Student Presentations:** Case studies for donor recognition groups and other strategies to develop donor loyalty

**Class-Prep Assignment:** Bring a list of prospective donor/s whom your partner nonprofit would like to identify (i.e., a general donor category, such as “corporate donors”) or cultivate (i.e., prospective donors whom they have already identified).

**Readings:**

AEFP 4<sup>th</sup> ed.

- Prine & Lesem “Ch. 7 Prospective donor and donor research and database management”
- *Reread* - Seiler “Ch. 5 Individuals as a constituency for fundraising”
- Tempel & Seiler “Ch. 31 Stewardship and accountability”

Library eBook/Canvas readings

- 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)

**Possible Readings Assigned for Student Presentation: TBA**

---

**WEEK 13**      **TOPIC 13) CAREER, CURRENT ISSUES, AND FUTURE OF PHILANTHROPY**  
**4/11**      **AND FUNDRAISING**

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

Guest Speaker: DBA

**Readings:**

AEFP 4<sup>th</sup> ed.

- Konrath “Ch. 2 The joy of giving”
- Aldrich “Ch. 36 Fundraising as a profession”

Library eBook/Canvas readings

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

**Final Group Preparation for the Term Project**

---

4/18                      No class – preparing for your final group paper and presentation

---

**WEEK 14              TERM PROJECT PRESENTATION**

4/25

\*\*\*\*\* 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 **4-5 page, double-spaced paper on giving motivation analysis**, along with a **1 page, single-spaced annotated bibliography of at least 2 research articles**, which are different from the required course readings. Sample research articles will be available in CANVAS-Files.

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 should 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 (ideally a draft of the final paper) with your partner nonprofit by the end of March 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 substantial revisions** 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 and Rationale:** Assess the efficiency and effectiveness of various fundraising programs and tools by using the analytical framework and key concepts we learn from course readings (e.g., “fundraising audit” and “total development plan”). With your findings, please explain what fundraising program/s you find to be appropriate for your partner nonprofit.
- **Recommended Fundraising Programs (a main part):** Describe the specifics of fundraising program/s and strategy/-ies you recommend to your partner nonprofit.
- **Practical Fundraising Tools:** Please also 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 materials, agenda and budget, a fundraising campaign plan and calendar, and/or recommended team construction (e.g., a fundraiser, board, and/or other volunteers). These tools should be original being developed based on what you learn from the course readings and activities. **Do not copy the tools and resources available online and include them in your paper.** If you use an existing tool as a base of your original tool, you must cite the source.

**Please send a copy of the final paper to your partner nonprofit for their evaluation no later than April 27<sup>th</sup> (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. 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 to develop your presentation plan.

You will present and lead class discussion as a group. Your group will prepare a 2+ page, **single-spaced** summary to distribute and post it on CANVAS 3 days before your presentation day. If you are unable to send me the summary by then, please prepare an enough number of copies for your classmates. Your group write-up should explain (1) **major findings**, (2) **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**.

A use of a presentation aid (e.g., PowerPoint and/or handouts) is strongly encouraged. Your group presentation will be timed. You and I will decide how long your presentation should be. In general, however, a presentation should be around 30 minutes, with an additional 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:

- Keep your philanthropic autobiography journal --- Highly recommended!
- 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**

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 cite the source.

#### **\*\*\*\*\* Portfolio Assignment 1 \*\*\*\*\***

**Topic 1) Fundraising Audit and Case Preparation:** (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. If your partner nonprofit has already developed a case statement, revise the existing case by following suggestions from the course readings/handouts along with a brief explanation of how you have revised it.

**Topic 2) Total Development Plan:** By using framework from Seiler "The Total Development Plan," and other resources that we use for Topic 4, develop your nonprofit's total development plan. Write a brief report to explain the findings, and make recommendations for how their current fundraising activities 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:** 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. Your group paper should include more than one fundraising tools/programs and 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:** 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:** Provide a brief explanation of (1) which fundraising programs and tools (e.g., direct mail, ePhilanthropy, and special events) you recommend for your partner nonprofit to build and expand a donor base, (2) who the partner nonprofit's prospective donors are, and (3) why the selected fundraising tools are appropriate to cultivate these prospects. Then, (4) develop a practical tool/plan to reach these prospects. This may be special event, direct mail, telemarketing campaign, and/or Internet, or a combination of any. Examples are as follows. These tools should be your original work following suggestions and checklists you find in the course readings and class handouts.

**A special event:**

- (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

**A mail and/or telemarketing campaign:**

- (1) Campaign timetable
- (2) A “solicitor” (who will sign the letter) (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

**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:** 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:** 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.