

## **PADM 7642 Resource Development for Nonprofits Online**

**University of Memphis, Fall 2018**

### **Professor:**

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### **Course Overview:**

This is a course on fund development methods and planning. Fundraising methods related to the annual fund, capital campaigns, and planned giving will be covered in turn. The course will also discuss tools for projecting fundraising revenues to create an annual budget. Finally, we will discuss strategies for continuous improvement of development-related activities, including donor-surveys and A/B testing.

The course emphasizes the strategic role that fundraising plays in the modern nonprofit organization. It makes the case that fundraising should not be an isolated function, and that it should be integrated with strategic planning, programs, and other organizational processes. For an organization to reach its full potential, board members and senior leadership at all levels should contribute to fund development. Therefore, the best practices presented in this course emphasize how every staff member and volunteer leader can support a nonprofit's mission through fundraising.

### **Learning Objectives:**

By the end of this course, students will be able to:

- Explain the fundraising methods that an organization can use to support its mission, and identify the methods that match an organization's needs and donor base.
- Describe best practices related to important fundraising methods, and evaluate current organizational practices to identify areas for improvement.
- Articulate the development-related roles and responsibilities of board members, leadership staff, and development office staff (including how these vary in small and large organizations).
- Write a compelling Case for Support in anticipation of a fundraising campaign or as part of ongoing fundraising solicitations.
- Use competitive positioning and program evaluation to enhance a case for support.
- Summarize the process for identifying, qualifying, cultivating, soliciting, closing, and stewarding major gift donors.
- Incorporate the broad range of annual fundraising methods into a comprehensive organizational development plan.
- Create annual fundraising projections and a corresponding development office budget, and understand risk factors which will affect an organization's fundraising potential.

- Comprehend the vocabulary used in fund development.
- Develop a donor survey, and use survey results strategically.
- Understand the role of A/B testing and identify opportunities for implementation.
- Articulate the ethical considerations related to fundraising, including ethics related to the annual fund, planned giving, major gifts, and restricted gifts.

### **Prerequisites:**

This course has a prerequisite requirement: PADM 7641: Theory and Practice of Nonprofit Administration. If you have not met this requirement, please talk with the instructor immediately.

This class is designed to be taken by MPA students and students in the Nonprofit Graduate Certificate. The course assumes a basic understanding of the nonprofit sector and nonprofit organizations, although no prior knowledge of nonprofit fund development is required.

### **Course Structure, Expectations, and Policies:**

Students are required to be active participants in all aspects of this course.

- The course is split into 12 modules, which will typically open Mondays at noon and close Sundays at 11:59pm. Typically modules will last for a week. Occasionally, the university academic calendar calls for some weeks to be shorter than average (Fall break, Thanksgiving break). The modules for these weeks will typically be stretched over two weeks. Please see the course outline for details.
- At the beginning of each week, you should open the week's module. The module will contain instructions for the week, including the week's learning objectives. It will also contain lecture-related materials (either a recorded lecture video or other lecture materials/notes) and information on required readings and assignments for the week. Students should aim to complete all readings and lecture materials by Thursday to allow sufficient time for class discussions.
- Each student is expected/required to participate in the online class discussions. Discussion questions will be posted to the eCourseware discussion tool, with separate threads for each topic. Participation will be tracked and factored into your grade. To fully participate, you must answer each discussion question in an informed, critical manner. Ideally, your answer will reflect course readings as well as personal experiences from organizations where you have worked, volunteered, or donated.
- In addition to posting your answers to questions, you are expected to reply to classmates' answers and respond to classmates' replies to your answers. Appropriate replies include adding personal examples to support a classmate's point, challenging a classmate's assertion, or asking for more information/clarification from a classmate. Replies are also factored into student grades.
- Students are expected to work independently on assignments. In general, individuals outside of the class should not be consulted for assistance with assignments. Three exceptions apply: 1) You may consult your partner organization on information related to their fundraising environment, practices, and results. 2) You may also visit the U of M Writing Center for help improving your written communications. 3) You may receive peer feedback using the structured system for peer feedback provided by your instructor (to be discussed in class). This is the only acceptable form of collaboration with classmates on assignments. The peer feedback step is optional.
- When emailing the instructor, please include the course number in the email title. This will allow me to quickly separate course emails from my other correspondence. Also note that class-related questions can be posted on the "Ask the Class" discussion forum!
- To complete the assignments in this course, you will need to select an organization to focus on this semester. You will need to have access to an informed staff member who is willing to share relevant documents and answer questions for you over the course of the semester. The assignments you complete may also be useful to the organization, so offering to share this work with the organization would certainly be appropriate. By September 10, please provide the name of the nonprofit that you plan to

focus on this semester. If you have trouble identifying a nonprofit, please contact me. I have a list of organizations who are interested in partnering with a student learning about fund development this semester.

### **Required Readings:**

This course depends on student participation, and participation depends on your preparation. The knowledge you gain in this course will largely depend on the effort you put into it. The required readings have been carefully selected based on learning objectives, and completing the reading will allow you to fully contribute to class discussions and maximize your score on written assignments.

There is one required text for this course:

Achieving Excellence in Fundraising, edited by Eugene Tempel, Timothy Seiler, and Dwight Burlingame. Published by John Wiley & Sons. 2016 edition is preferred.

In addition to the traditional text book, weekly course materials (articles, cases, etc.) will be posted on the course's website.

### **Assignments/Grading:**

The following is a brief outline of all assignments. As this is an online course, most assignments are written. Writing is expected to be presented in a logical format without errors in grammar and spelling. A professional style of writing is appropriate for most assignments. For readability, please turn in work that is typed and double-spaced.

Weekly Responses (12): Each week, there will be discussion questions related to the lectures, readings, and other materials. Students are expected to provide an answer to the posted questions using the discussion board. There will usually be some required and some optional questions. The answers should provide 2-3 paragraphs of thoughtful, original feedback on the question and should demonstrate a synthesis of course material, with appropriate references. Students should also provide 2 follow-up responses to their peers' posts. Follow-up responses should be substantial and add to the conversation. Examples of substantial comments include adding to the answer with additional examples, challenging the underlying assumptions of the answer (in a professional way), or asking questions related to the answer. To give other students something to respond to, your original answer absolutely must be posted by the question completion date, which will typically be a Friday. I will drop your two lowest weekly response grades.

Assignments (4): There are four graded assignments in this course. To complete the assignments, you will need to select an organization. This can be an organization where you currently work or volunteer, or it can be another organization that you develop a relationship with for the purposes of this course. (See me for a list of organizations who have expressed an interest in working with students this semester.) You will find your work easier if you build a rapport with the organization you have selected. You will need to ask the organization to provide copies of its development materials, discuss practices around donor and Board engagement, and share aggregate fundraising data with you. Most students also offer to provide copies of your assignments to the organization for its use.

Each assignment will be submitted through eCourseware and graded anonymously. All assignments are due on the day indicated in the course schedule at 11:59pm. Late assignments will receive a 10% grade deduction for every day that they are late; after 11:59pm on the fourth day, you will receive an F for that assignment. Assignments must be turned in using the electronic course management system – they should not be emailed to your instructor. More details will be provided about each assignment closer to the due date.

- Case for Support Assignment – Craft a 3-page document describing the mission priorities and future needs for an organization, with the goal of developing a compelling case for why a donor should support the organization.
- Donor Profile Assignment – Develop an overview of the important donor groups which support an organization. Using resources from class, explain the motivations of these donor group, the aspects of the case for support that are compelling to the donor group, and how targeted communications might persuade the group to increasing giving.
- Annual Fund Assignment – Compare and contrast the direct response activities (direct mail and/or online solicitations) of your focus organization and another organization with a similar mission. Assess the strengths and weaknesses of each approach, considering that the two organizations may not have the same donors or case for support. Explain how the appeals of your focus organization might be improved by using concepts from class, suggesting new text as appropriate.
- Engagement Assignment – Evaluate the fundraising engagement of Board members and non-development staff in the focus organization. Discuss how the strengths of each of these constituencies are/can be used to further the organization’s development goals. Articulate a plan for improving fundraising engagement by Board members and non-development staff over the next year.

At the end of the semester, you will have an opportunity to revise and resubmit one assignment. Resubmissions will be due during finals week, at a date to be announced.

Course Reflection: During finals week, you will complete a short (400 to 600 words) reflection. In the reflection, you will share your perspective on the most important topics, insights, and readings from the course. You will identify areas where you have grown in your understanding of fund development and areas you wish explore more in the future.

Grade Weights:

- Weekly Responses 25%
- Case for Support Assignment 17.5%
- Donor Profile Assignment 17.5%
- Annual Fund Assignment 17.5%
- Engagement Assignment 17.5%
- Course Reflection 5%

Your final grade\*\* will be based on the following grading scale:

A+ 97-100	B 83-86	C- 70-73
A 93-96	B- 80-82	D+ 67-69
A- 90-92	C+ 77-79	D 63-66
B+ 87-89	C 74-76	F 62 and less

*\*\*Grades may be curved upwards based on class performance. They will never be curved downward.*

**Office Hours:**

I want you to succeed in this course! Professor office hours are on an appointment system. You may sign up for an appointment (phone, Skype, or in-person) using the scheduling website, <https://vancemcmullen.youcanbook.me>. If you have scheduling conflicts which prevent you from meeting during the scheduled office hours, please contact the me.

Occasionally my speaking obligations or other academic conflicts will force me to move office hours from the ones indicated on the first page of the syllabus. When this happens, the new office hours will be announced.

## **Other Policies:**

University policies on cheating, plagiarism, students with disabilities, etc. apply to this course.

[Student conduct and discipline](#)

[Academic honesty and online integrity](#)

[Students with disabilities](#)

A few specifics...

Academic Misconduct and Integrity: The Office of Student Conduct defines the following:

- *Plagiarism* - The adoption or reproduction of ideas, words, statements, images, or works of another person as one's own without proper attribution.
- *Cheating* - Using or attempting to use unauthorized materials, information, or aids in any academic exercise or test/examination. The term academic exercise includes all forms of work submitted for credit or hours.
- *Fabrication* - Unauthorized falsification or invention of any information or citation in an academic exercise.

As outlined in the *UM Code of Student Rights and Responsibilities*, cheating and plagiarism will result in severe disciplinary action. Either offense will be grounds for receiving an "F" on the assignment or examination and possibly an "F" for the course, depending on the severity of the offense. Please contact the instructor if you have any questions about these topics.

Students with Disabilities: The University encourages full participation of students with disabilities. Any student who anticipates physical or academic barriers based on the impact of a disability is encouraged to speak with me privately. Students with disabilities should also contact Disability Resources for Students (DRS) at 110 Wilder Tower, 901-678-2880. DRS coordinates access and accommodations for students with disabilities.

**Course Outline:**

<b>Week</b>	<b>Topics</b>	<b>Assignments Due</b>
August 27	Introduction to Fund Development	<i>* Weekly Responses Each Week</i>
September 3 (shorter week)	Case for Support	Focus organization selection Due September 10
September 10	What Individual Donors Value	
September 17	Institutional Donors (Corporations and Foundations)	
September 24	Structuring the Fundraising Operation	Case Assignment Due September 26
October 1	Personal Solicitation	
October 8	Direct Response Solicitation (including Online)	Donor Profile Due October 10
October 15 (super-short week)		
October 22	Special Events; Marketing and Communications for Fundraising	
October 29	Engaging the Board and Leadership Volunteers in Fundraising	Annual Fund Assignment Due October 31
November 5	Managing and Leadership in Fundraising; Organizational Development for Fundraising	
November 12	Budgeting, Projection, and Planning; Evaluating Success	Engagement Assignment Due November 21
November 19 (super-short week)		
November 26	Stewardship, Accountability, and Ethics	
December 3 (super-short week)		
December 10 (finals week)		Reflections Due December 9 Resubmissions Due December 12