The students will have an opportunity to analyze needs and develop fundraising strategies for a not-for-profit of his/her own choosing; understand external issues which impact successful fundraising and participate in a practicum for meeting with donors. Topics in the course will focus on board development, understanding the importance of a development plan, designing critical campaigns, identifying multiple sources of funding, the importance of research and creating a donor-centered organizational culture. (Pre-requisite for this course: “Foundations of Non-Profit Management”).

REQUIRED READINGS:

There is one required text for the course:

Additional readings listed below are available on the web; for these I have indicated the URL.

In addition, the course will provide information on resources that can be used to research and implement a development plan. As much as possible, we will utilize cases, role-plays and speakers with relevant experience. Students are expected to attend all classes on time and to be prepared to participate in discussions of assigned readings and class exercise.
Class # 1: Introduction and Organizational Readiness  September 8, 2010

- History of Philanthropy in America
- Understanding why people give
- Where to look for financial resources in a difficult fundraising climate
- Assessing organizational readiness for fund-raising
- Elements of a Development Plan

Readings:
- Ciconte & Jacob, Chapters 1 and 5

Discussion of Dana Farber assignment #1(see attached)

and

Discussion of mini-assignment #1

Class # 2: Total Resource Development: Designing Critical Campaigns  September 15, 2010

- Effective Strategies for the Annual Campaign
  1. Special events
  2. Face-to-Face solicitations
  3. Opportunities and challenges of internet fundraising
  4. Telephone solicitation & direct mail
- Capital Campaigns
  1. Determining the need
  2. Is the organization ready? Differences from annual readiness
  3. What success looks like
  4. Step-by-Step Planning
- Attracting non-traditional donors

Discuss mini-assignment #1
Readings:
- Ciconte & Jacob, Chapters 6, 7 & 14 and Capital Campaign case study
- “Top 7 Indicators That You Should Consider a Capital or Endowment campaign,” article, Bob Carter, GuideStar http://www.guidestar.org/news/features/seven_indicators.jsp
- “When Charity Begins with A Circle of Friends”, article, Holly Hall, Kristina Shevory, New York Times, 2005
- “Giving By & for Women Grows”, article, Philanthropy Journal http://www.philanthropyjournal.org/news/giving-and-women-grows (see the survey embedded in article)
- “Fund-Raisers Fail to Tap Self-Made Wealthy Women, Author Finds,” article, Holly Hall
- “Causes Supported by Minorities Differ by Age of Donor,” article, Brennen Jensen, Chronicle of Philanthropy
- “Courting Gay Donors,” article Holly Hall, Chronicle of Philanthropy

Reading for Assignment #1

“The Dana Farber Cancer Institute, Case Study, Harvard Business School

Class # 3: Designing Critical Campaigns (Continued) September 22, 2010

- Working with Board of Directors
  1. Role and function of Board of Directors in successful resource development
  2. Board-staff relationships
  3. Role of program staff in resource development
  4. Volunteers as prospects

- Planned Giving & Endowment Campaigns- Guest Speaker: Josh Rednik, CFP, Executive Director, Jewish Community Foundation of Metro West of New Jersey
1. Critical elements
2. Step-by-step planning
3. When is the right time for your organization
4. Vehicles for making gifts

**Discussion of assignment #2 & final assignment (see attached)**

**Readings:**
- Ciconte & Jacob, Chapters 2, 15 and case study
- “The Logic of Building an Endowment,” article, Ben Gose, *Chronicle of Philanthropy*
- “Five Steps in Launching Planned Giving Programs”, article, Julia Vail, May 2008 [http://www.philanthropyjournal.org/resources/fundraisinggiving/five-steps-launching-planned-giving-programs](http://www.philanthropyjournal.org/resources/fundraisinggiving/five-steps-launching-planned-giving-programs)

**Note: Assignment #1 due**

**Class #4: Other Sources of Funding: Corporate Partnerships & Cause-Related Marketing; the Internet & Social Networking**

1. What are corporations looking for?
2. What does your organization have to offer a corporate partnership?
3. Pros & Cons for your organization
4. Internet fundraising and social networking
5. The government as a source of funding

**Discuss in pairs mini-assignment #2**

**Readings:**
- Ciconte & Jacob, Chapter 10; Chapter 7, pp123-126 & pp 134-135
- “The Social responsibility of Business is to Increase its Profits”, Milton Friedman. 
  http://www.colorado.edu/studentgroups/libertarians/issues/friedman-soc-resp-business.html
- “Proving the Win-Win Strategy of Cause-Related Marketing”, Jessica Stannard-Fried 
- “Myths of Affinity Marketing”, article, Stephen Holliday, Philanthropy Journal, July 24, 2009 
  http://www.philanthropyjournal.org/resources/fundraisinggiving/myths-affinity-marketing
- “Online fundraising: A Startup Guide”, Joanne Fritz  
  http://nonprofit.about.com/od/onlinefundraising/tp/onlinefundraisinghub.htm?r=et
- “5 Trends that Will Affect Online fundraising in 2010”, Network for Good 
  http://www.fundraising123.org/article/5-trends-will-affect-online-fundraising-2010
- “Online giving marketplace growing quickly”, Todd Cohen 
  http://www.philanthropyjournal.org/news/online-giving-marketplace-growing-quickly
- Government Funding for Charities: When it Declines, Charities Lose Twice 
  http://www.charitynavigator.org/index.cfm/bay/content/view/cpid/281.htm
- Federal Government Grants: No Free Lunch 
  http://usgovinfo.about.com/library/weekly/aa060400a.htm

Return & discuss assignment #1

Class # 5: Research Matters October 6, 2010

1. Developing research capacity
2. Screening, rating and evaluation
1. Prospect identification and tracking
2. Effective use of technology

Readings:
- Ciconte & Jacob, Chapter 8

Discuss “mini-assignment” #3: Prospect names for solicitation exercise next week Packet handout
Note: Assignment #2 due

Class # 6: Successful Foundation Relationships- Guest Speaker: Mark Bodden, Vice-President & Program Officer, The Rudin Foundations
October 13, 2010

3. Steps to insuring a positive foundation relationship
4. Increasing your organization’s success in securing foundation grants

Readings:
- Ciconte & Jacob, Chapter 11
“40% of Foundations Expect Giving to Drop in 2009, Chronicle Study Finds”, article, Noelle Barton  

Return & discuss Assignment #2

Class #7: Creating a Donor Centered Culture          October 20, 2010

Today there are 1000’s of non-profit organizations competing for donor dollars. How can you help create a “donor-centered” culture within your organization? How do you develop and define a winning approach to donors?

1. How to identify, retain and involve individual donors
2. Stewardship
3. How to develop a donor-centered culture throughout your organization

Readings:
- Ciconte, Donor Bill of Rights, page 7
- “Asking Successfully for Major Gifts,” article, Fund-Raising Management
- “To Ask & How to Ask: Those are the Questions,” article, NY Times (Nov. 2005)
- “The Meaning of Connecting the Donors Interest with the Agency’s Priorities”  
http://ejewishphilanthropy.com/the-meaning-ofconnecting-the-donor%E2%80%99s-interest
  7/13/09

Relationship Building/Solicitation- Practicum

1. Developing a prospect
2. Securing an appointment
3. Face-to-Face solicitation
4. Soliciting and Closing a gift
5. Donor stewardship
Final assignment due

WRITTEN ASSIGNMENTS:

Assignment #1: Due Class #3

Assignment: The assignment is based on the Dana-Farber Cancer Institute Case Study

Due: September 22, 2010

NOTE: Late papers will not be accepted unless prior arrangements are made with the instructor. This assignment will be 15% of your final grade.

You are a development consultant who has been hired by Susan Paresky to assist her in increasing the effectiveness of the development operations at Dana-Farber Institute. There are both long term and short term decisions to be made and recommendations that need to be presented to the trustees of the Institute for their review and action. Your suggestion is that, as a first step in devising a set of recommendations, you provide an analysis of the development office, its current fund raising programs and opportunities. You have met with her, with development office staff, trustees and the President of the Institute and gathered the information presented in the case study. You need to write Susan a memo describing for her the relevant strengths, weaknesses, opportunities and threats that you have identified. They should be presented in narrative form and in a way that will help Susan decide:

1) Which programs to keep and which to phase out

2) How to position (or re-position) the Jimmy Fund to meet the evolving needs of the Institute

3) Which, if any, of the proposed corporate associations to recommend to the trustees
You should **not make specific recommendations for action** at this point, but simply **provide** the **data** that will be the basis for your next conversation with Susan. Susan is a very busy executive, so the memo should be concise.

(This assignment should be **3-4 pages** in length and will comprise **20% of your final grade**.)

**Assignment #2: Due Class #5**

**Note:** Assignment #2 and the final assignment are related.

Imagine that you have been hired as the development consultant to an existing not-for-profit organization to review their development operations. The final product of this course will be for you to summarize your findings and make **recommendations for a development plan, with rationale**, to the Executive Director of this not-for-profit, preferably an **existing organization** to which you have access.

In **assignment #2**, utilizing the tools we review in class and those presented in the readings, you will be expected to analyze the organization for strengths and weaknesses, discuss the environment in which it operates, its potential and suggested positioning.

**Assignment #2** gives you the opportunity to develop the analysis portion for your final assignment. Some of the questions to be answered are:

- How do you analyze the strengths and weaknesses of your organization?
- How does this analysis relate to what else is going on in the world of philanthropy?
- What are the opportunities for the organization to grow and develop?
- What are the fund-raising challenges?

We will have a full discussion regarding this assignment in class before the due date. You will be expected to write an analysis of **not more than 4 pages**. Please turn in **2 copies**. This assignment will comprise **20% of your final grade**.

**Final Assignment: Due Class #7**

The final assignment is to recommend a **complete development plan** to the Executive Director of the organization you have chosen.

Most **critical** in this **final assignment** will be your rationale and recommendations for **specific strategies and tools** that the organization should adopt. Recommendations should be cost effective and consider available budget. The development plan should have a timetable. **Your recommendations should be developed based on your analysis for**
Assignment #2. (If you are analyzing a large organization, you may choose to select a specific program or component for analysis.)

This document should be in the form of a Memo to the Executive Director of the organization from you as the development consultant. This assignment should be 6-8 pages in length and will comprise 40% of your final grade.

If you are unable to access an existing organization, a case will be available for you to use. However, you will need to explain the circumstances that require you to do so.

10% of your final grade will be based upon your participation in class and on-line.

Mini-assignments: The remaining 10% of your grade will be based on these mini-assignments

#1: Due Class #2

Students are to bring to class a copy of the Mission and fundraising Case Statement

#2: Due Class #4:

- Students are to bring articles to class #4 about recent non-profit/corporate partnerships. Be ready to discuss pros and cons of the partnership, which partner benefits the most and does it work?
- Bring a list of what your organization has to offer a corporate partner.

#3: Due Class #7:

We will be practicing one-on-one solicitations. Please bring to class the name of a real prospect you want to solicit. Please conduct research on this prospect before deciding he/she is the one you want to solicit.