Course Requirements: Attendance at all classes, give our limited time together, is essential; if you must be absent please let me know in advance. Grading is as follows: class participation (20%), team exercise (30%), and one take home exam (50%).

Course Readings: The textbook is Hank Rosso’s *Achieving Excellence in Fund Raising* (Second Edition), which will be available at the NYU Bookstore. A course reader of required articles is available at Unique Copy Center (252 Greene Street at Waverly Place – 212.420.9198). Copies of the readings and the textbook will be on reserve at Bobst Library, with a 2-hour reserve time.

Students with disabilities: Any students requiring accommodations should contact me to make proper arrangements. Please be prepared to share your documentation from the NYU disabilities office regarding appropriate accommodations.

Classes will be held from 5:30-8:00 PM with one 10 minute break.

CLASS 1- TUESDAY, JANUARY 4, 2011

I. Philanthropy and its Role in Society
   
   A. History of American Philanthropy
   B. Billions given for causes
   C. Types of gifts – major gifts, annual gifts, planned gifts, direct marketing, and phonathon.

   Texts:
     Part one: Fund Raising – Context and Philosophy
     Chapters 1-2, (pages 1-19)
     Chapter 7, (pages 61-64)
     Chapter 8, (pages 71-88)
     Chapter 9, (pages 89-102)
   
   • *American Philanthropy*, Robert H. Bremmer
     Introduction (pages 1-4) / Chapter 1, Doing Good in the New World (pages 5-19)
   
CLASS 2 – WEDNESDAY, JANUARY 5, 2011

II. Capital or Comprehensive Campaigns: Should You or Shouldn’t You?

A. Developing the case and Marketing
B. Determining the goal
C. Reporting and valuing gifts
D. Roles for volunteers, trustees, board/council members
E. How do you build a team?
F. Research and prospect identification

Texts:
  Chapters 11, (pages 117-138)
  Chapter 13, (pages 164-168)
  Chapter 20, (pages 268-269)
  Chapter 25, (pages 335-348)

• CURRENTS, Nov/Dec 2010
  “MapQuest” (pages 24-31)

• Financial Accounting Series, June 1993—No. 127-A.
  Statement of Financial Accounting Standards No. 116 (FASB), (pages 1-10)

• (CASE) Council for Advancement and Support of Education
  Fund-raising Standards for Annual Giving and Campaign Reports for Not-for-Profit
  Organizations.
  Introduction (pages XI-XIV)
  Chapter 1 (pages 3-30)
  Chapter 3 (pages 43-49)
  Chapter 7 (pages 79-88)

• CASE Currents Magazine, October 2007
  “Going Fourth” (pages 16-22)

Guest Speaker:

David Koehler, Deputy Vice President of Principal Gifts, New York University
CLASS 3 – THURSDAY, JANUARY 6, 2011

III. Fundraising by Constituency: Special interest and affinity groups
IV. Corporations and Foundations
V. How to Build a Fundraising Organization for a new Charity

Texts:
  Chapter 14-15, (pages 177-188)  
  Chapter 16, (pages 200-214)
- CASE Currents Magazine, November/December 2006  
  “Community Writ Large and Small”
- CASE Currents Magazine, May/June 2007  
  “Like with Like”
- FORTUNE, May 15, 2007  
  “Attracting the Twentysomething Worker”
- Newsweek, June 16, 2008  
  “See You at the Reunion. Or Maybe Not.”
- Women’s Philanthropy Institute, October 21, 2010  
  “Women Give More to Charity than Men, New Study Shows”
- CURRENTS, Nov/Dec 2010  
  “Precision and Patience” (pages 18-23)
- Warren Buffett  
  “My Philanthropic Pledge”
- New York Times, November 10, 2010  
  “Pledge to Give Away Fortunes Stirs Debate”
- New York Times, November 10, 2010  
  “Foundations With a Limited Life”
- James J. Fishman & Stephen Schwarz, Nonprofit Organizations (Cases and Materials),  

Guest Speakers:

Harvey Dale, University Professor of Philanthropy and the Law, NYU School of Law;  
Director, National Center on Philanthropy and the Law

Lisa Mueller, Director of Development & Communications, Sanctuary for Families
CLASS 4 – TUESDAY, JANUARY 11, 2011

VI. Recruitment and Retention of Major Donors
   A. Cultivation of Major Donors
   B. Stewardship of Major Donors
   C. Perpetuity? How is it defined?

VII. The Ethics of Fundraising

VIII. Life as a Development Officer: the good, the bad, be careful what you wish for! And, what do you do in a down turn economy?
   D. Gifts that keep on taking
   E. Gifts that need to be returned
   F. Dealing with difficult donors
   G. Gifts that are off-mission
   H. Lean Times

IX. International Charities, NGO’s and Fundraising Opportunities

Texts:

  Chapter 26 (pages 349-365)
  Chapters 30-31 (415-441)

  “David H. Koch to Give 100M to Theater”

- New York Times, March 17, 2010
  “Foundation Promotes Art as Well as Sole Trustee”
Fundamentals of Fund Raising
Robert F. Wagner Graduate School of Public Service

Instructor: Debra A. LaMorte – Course #: P11.4131, Section 001
Spring Intersession, Meeting dates: January 4-6, 11-13
5:30-8:00 PM – Bobst Library, 70 Washington Square South, Room LL150

  “Princeton Faces Trial Over Use of Gift Now Worth $880 Million”

  “Formerly Lavish Music Patron is Convicted of Fraud”

- Inside Higher Ed, December 11, 2008
  “Unsettling Settlement over ‘Donor Intent’”

- ArgusLeader.com, October 2, 2008
  “USD Lawsuit Settlement Redirects Business School Donation”

  “English Lessons”

- Center for Community Change, October 14, 2008
  “Fundraising Success in a time of Financial Crisis – It is Possible”

  “Bracing For Lean Times Ahead”

  “The Nonprofit’s Guide to Surviving a Downturn”

- New York Times
  “As The Economy Declines, Donors Rethink Estate Plans”

- Gino Lofredo, pages 64-69
  “Help Yourself by Helping the Poor”

Guest Speakers:

Jennifer Tierney, Director of Development, Doctors without Borders

Bradley McKenna, Director of Development, Goods for Good International
CLASS 5 – WEDNESDAY, JANUARY 12, 2011

I. Fundraising from Grassroots to Global

II. Team Assignment:

- Role playing – Teams will be assigned to role play specific gift solicitation scenarios.

Guest Speaker:

Philanthropist (TBD)

CLASS 6 – THURSDAY, JANUARY 13, 2011

Team Assignment:

- Role playing – Teams will be assigned to role play specific gift solicitation scenarios.