Course Requirements: Attendance at all classes, given 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%); one take home exam (50%).

Course Readings: The textbook is *Achieving Excellence in Fundraising* (Third Edition), edited by Eugene R. Tempel, Timothy L. Seiler and Eva E. Aldrich. The text 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 textbook will be on reserve at Bobst Library, with a 2-hour reserve time. Due to copyright restrictions, copies of the course reader may not be available at Bobst. However, if you wish not to spend the money on the course reader, most articles can be found online.

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.

January 2015 Class Meeting Dates:

<table>
<thead>
<tr>
<th>Tuesday, January 6, 2015</th>
<th>Thursday, January 15, 2015</th>
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<td>Thursday, January 8, 2015</td>
<td>Tuesday, January 20, 2015</td>
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<tr>
<td>Tuesday, January 13, 2015</td>
<td>Thursday, January 22, 2015</td>
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Classes will be held from 5:45-8:15 PM with one 10 minute break.
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, social media

Textbook Reading:

  Chapters 1-2, (pages 3-17)
  Chapter 5-6 (pages 41-63)
  Chapter 9, (pages 92-114)
  Chapter 26, (pages 295-306)

Reader Articles:

  Introduction (pages 1-4) / Chapter 1, “Doing Good in the New World” (pages 5-19)


  “A Shake-Up as the Financial World Infiltrates Philanthropy”

  “The Rise of the Chinese Philanthropist”

- The New York Times, November 6, 2014
  “New Donor Generation Stimulates U.S. Giving”

- Chicago Tribune, December 2, 2014
  “Charitable Giving on the Rise Among Wealthy”

  “The Accidental Fund Raiser”
CURRENTS, SEP 2011
“Give and Take: Is There a Connection between Philanthropy and Taxes?”

“Why Fund-Raising is Fun”

The New York Times, November 14, 2014
“The Ice-Bucket Racket”

The New York Times, November 6, 2014
“Ice Bucket Challenge: Can Lightning Strike Again?”

Guest Speakers:

Erin Dodd, Executive Director, the Fund for NYU

CLASS 2 – THURSDAY, JANUARY 8, 2015

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. Research and prospect identification
F. How do you build a team?

Textbook Reading:

- Achieving Excellence in Fundraising (Third Edition)
  Chapters 8, (pages 81-91)
  Chapter 20, (pages 235-246)
  Chapter 25, (pages)

Reader Articles:

- CURRENTS, Nov/Dec 2010
  “MapQuest” (pages 24-27)

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 Speakers:

- David Koehler, Deputy Vice President of Principal Gifts, New York University
- Lisa Mueller, Director of Development & Communications, Sanctuary for Families

CLASS 3 – TUESDAY, JANUARY 13, 2015

III. Corporations and Foundations

IV. Fundraising by Constituency: Special interest and affinity groups

Textbook Reading:

  Chapters 13-14, (pages 150-171)
  Chapters 16-17, (pages 183-210)

Reader Articles:

- CASE Currents Magazine, November/December 2006
  “Community Writ Large and Small”
- CASE Currents Magazine, May/June 2007
  “Like with Like”
- 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”

- Forbes, April 18, 2013

  “Asian-Americans Gain Influence in Philanthropy”

- Forbes, May 1, 2013
  “What it Means to be a Philanthropist – Gen Xers and Millenials Weigh In”

- East Bay Express, March 20, 2013
  “The Bacon-Wrapped Economy”

- Denver Post, June 10, 2012
  “Colorado Symphony Orchestra Rethinks Programming, Funding, Everything”

- CURRENTS, Nov/Dec 2010
  “Precision and Patience” (pages 18-23)

- The Wall Street Journal, March 9, 2011
  “When Philanthropy Goes Wrong”

- Warren Buffett
  “My Philanthropic Pledge”

- New York Times, November 10, 2010
  “Pledge to Give Away Fortunes Stirs Debate”

**Guest Speakers:**

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

**CLASS 4 – THURSDAY, JANUARY 15, 2015**

V. Recruitment and Retention of Major Donors

   A. Cultivation of Major Donors
   B. Stewardship of Major Donors

VI. The Ethics of Fundraising

   A. Perpetuity? How is it defined?
VII. Life as a Development Officer: the good, the bad, be careful what you wish for!

A. Gifts that keep on taking
B. Gifts that need to be returned
C. Public Relations

VIII. International Charities, NGO’s and Fundraising Opportunities; How to Build a Fundraising Organization for a new Charity or Revamp fundraising for an Existing Charity

Textbook Reading:

  - Chapter 7 (pages 64-80)
  - Chapter 15 (pages 172-182)
  - Chapter 23 (pages 268-272)
  - Chapters 35-36 (pages 395-424)

Course Reader:

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

  “Lincoln Center to Rename Avery Fisher Hall”

- Philanthropy.com, December 4, 2013
  “A Big Donor Volunteers to Give Back Naming Rights to Help Fundraising”

- The New York Observer, November 1, 2014
  “Slush Funds: Anonymous Giving Exposed”

- CURRENTS, SEP 2011
  “Clear and Present Danger”

  “The Dean of Corruption”

  “Formerly Lavish Music Patron is Convicted of Fraud”
The Washington Post
“Johns Hopkins Lawsuit Highlights Questions About Schools’ Obligations to Donors”

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

The New Yorker, May 27, 2013
“A Word from our Sponsor”

Associated Press, January 24, 2012
“Jury: Hospital Must Pay Garth Brooks $1M for not Building Women’s Center to Honor His Mom”

“Legal Battle Over a Planned Gift Grounds a Female Aviator’s Legacy”

“A $250 Million Pledge to a College Evaporates as a Deal Collapses”

The Chronicle of Philanthropy, April 21, 2013
“Charities Deal with a Stream of Lawsuits from Disenchanted Donors”

The New York Times, October 12, 2013
“A Ransacked Endowment at New York City Opera”

Guest Speakers:

• Jerryanne Heath Chiume, Development Director, goods for good

CLASS 5 – TUESDAY, JANUARY 20, 2015

X. Life as a Development Officer: the good, the bad, be careful what you wish for! (cont.)

A. Dealing with Difficult Donors
B. Gifts that are off Mission

XI. Times of Financial Crisis: what do you do in a down turn economy?
XII. Team Assignment:

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

Textbook Reading:

  Chapter 34 (pages 383-392)

Course Reader:

- CommunityChange.org, October 30, 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”

  “Making an Argument for a Narrower Focus in Charitable Donations”

Guest Speaker:

- Thomas Kurmann, Doctors without Borders

CLASS 6 – THURSDAY, JANUARY 22, 2015

XII. Team Assignment:

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

Guest Speakers:

Barbara and Evan Chesler, Philanthropists
*REMINDER:
Final exam due by midnight on Thursday, January 29, 2015 to debra.lamorte@nyu.edu