

University of North Texas at Dallas
Spring Semester 2017
SYLLABUS for Distance Learning

PLDR 53XX: Fundraising Principles and Grantwriting
3 Credit Hours

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| Department of | Public Leadership | School of | Liberal Arts & Science |
| Instructor Name: | Dr. Janiece Upshaw | | |
| Office Location: | FH259 | | |
| Office Phone: | | | |
| Email Address: | janiece.upshaw@untdallas.edu | | |
| Office Hours: | Tuesday – 3:00 – 5:50 Wednesday – 3:00 – 5:50 Thursday 2:00 – 4:00 | | |
| Classroom Location: | FH306 | | |
| Class Meeting Days & Times: | Saturdays 9:00 a.m. – 2:50 pm (See syllabus p.2 for Face-to-Face vs. Online schedule) | | |
| Course Catalog Description: | Fundraising Principles & Grant Writing: A practical understanding of advanced concepts, techniques and theories of fundraising for nonprofit and community leaders; including the preparation of an effective grant application | | |
| Prerequisites: | | | |
| Required Text: | Sargeant A., Shang J, and Associates (2010) <i>Fundraising Principles and Practice</i> , Jossey Bass, San Francisco. ISBN 978-0-470-45039-0 | | |
| Access to Learning Resources: | UNT Dallas Library: phone: (972) 780-1616 web: http://www.untdallas.edu/library email: library@untdallas.edu UNT Dallas Bookstore: phone: (972) 780-3652 web: http://www.untdallas.edu/bookstore e-mail: untdallas@bkstr.com | | |
| Course Goals or Overview: The goals of this course are as follows - | | | |
| | <ol style="list-style-type: none"> 1. To understand and critically evaluate how the voluntary sector solicits funds from individual, corporate and foundation donors 2. To apply a wide range of tools, models and frameworks to solve practical fundraising problems 3. To analyze and evaluate a fundraising strategy 4. To analyze and evaluate the legal and ethical implications of various forms of professional practice | | |
| Learning Objectives/Outcomes: At the end of this course, students will be able to: | | | |
| 1 | Understand and implement the Institute of Fundraising/AFP Codes of Professional Conduct | | |
| 2 | Develop a fundraising plan for a charity or other nonprofit organization | | |
| 3 | Understand the nature and process of fundraising strategy development, both in relation to the solicitation of new donors and the retention and development of existing donors | | |
| 4 | Apply a disciplined approach to the analysis of various complex fundraising problems and their resolution through the selective and appropriate use of tools for analysis and strategy formulation | | |
| 5 | Produce a grant for a nonprofit organization in the Dallas community. | | |

Online/Hybrid Course Outline

This schedule is subject to change by the instructor. Any changes to this schedule will be communicated in class or via class email or Blackboard announcement. Additional readings and activities may be added, these will be noted in the Readings and Activities/Assignments sections.

| Schedule | Topic | Activities | Due Date |
|---|--|--|--|
| Week 1 Oct. 17 - 23 Online | | Discussion # 1 Assignments: Where's the Money? Assignment Due Oct. 23 at 11:59 p.m. Inspirational Videos due Oct. 23 at 11:59 p.m. | |
| Week 2 October 24-30 Class - Oct 29 9:00 a.m. – 12:00 noon | Introductions, Course Overview and Introduction to the Nonprofit/Charity Sector Legal/Ethical Aspects of Fundraising Understanding Giving and Donor Behavior Introduction to Fundraising Planning | Sargeant, Shang & Associates Part One: pp. 3-112 Chapters 1- 5 | |
| Week 3 Oct. 31 – Nov6 Class Nov. 5 9:00 – 2:50 p.m. | Fundraising Planning Case Statement Grant Writing & Evaluation Donor Recruitment Donor Development and Retention | Sargeant, Shang & Associates Part Two: pp. 113-xxx Chapters 6-7 | Case Statement – Due Nov. 23 Fundraising Plan 1, d, e, h due Nov. 23 Grant – Due Nov. 30 |
| Week 4 Nov. 7 - 13 Online | Direct Response Media Stewardship | Sargeant, Shang & Associates Part Two: pp. xxx-235 Chapters 8-9 | Discussion #2 Due November 13 at 11:59 p.m. |
| Week 5 Nov. 14-20 Class Nov. 19 9:00 – 2:50 | E-Fundraising / Digital Communications Mix Bequest Fundraising and Planned Giving Major Gift Fundraising Events Fundraising | Sargeant, Shang & Associates Part Three: pp. 237-xxx Chapters 10 - 13 | |
| Week 6 Nov. 21 - 27 Online | Budgeting / Assessing Fundraising Performance Community Fundraising / Managing Volunteers Corporate Fundraising – Sponsorship/ Workplace Giving/CRM/Staff Fundraising | Sargeant, Shang & Associates Part Three: pp. xxx- 484 Chapters 14 - 17 | |
| Week 7 Nov. 28- Dec. 4 Online | Trust/Foundation Fundraising Capital Campaigns Women in Philanthropy Social Role of Fundraising Managing Public Trust and Confidence | Sargeant, Shang & Associates Part Four: pp. 489-593 Chapters 18-22 | Discussion #3 Due Dec 3 at 11:59 |
| Week 8 Dec. 5 – 10 Class – Dec. 10 | Presentations | | Annual Fund Plan Assignment Due: Dec. 10 (Add: b, c, l, j, k, l, m) |

Face-to-Face: Oct. 29: 9:00 a.m. – 12:00 noon
Nov. 5: 9:00 a.m. – 2:50 p.m.
Nov. 19: 9:00 a.m. – 2:50 p.m.
Dec. 10: 9:00 a.m. – 2:50 p.m.

Course Evaluation Methods

This course will utilize the following instruments to determine student grades and proficiency of the learning outcomes for the course.

Discussion Posts

Discussion #1 – Due October 23 (25 points) (found under Course Information Link)

a. Where’s the Money? (8 points)

Review the Giving USA Highlights Report and Take the “Where’s the Money?” quiz. Submit online to “Where’s the Money? Assignment” found in the Course Information link on Blackboard.

b. Inspirational Videos (17 points) (Found under Course Information Link)

This assignment is worth 17 points. See rubric below for scoring. On the link below, you will find 11 videos produced by nonprofit organizations.

<https://www.classy.org/blog/11-nonprofit-videos-that-inform-and-inspire/>

Watch all of the videos (each video is 2 minutes - 5 minutes in length).

Select three of the videos that you find most inspiration and write 1-2 paragraphs on each of the three videos. Make sure to answer these questions in your paragraphs:

1. What did you find compelling about this video?
2. What were the strengths of their storytelling?
3. Does this video inspire you to . . . donate? volunteer? take some action?
4. Did you connect personally/emotionally to this video? In what way?
5. How do you believe this video helps the organization in their fundraising efforts?

Format of paper: Use APA style (title page, 1" margins, 12 pt. Times New Roman font, double-spaced, APA sub-headings, page numeration)

Title: Inspirational Videos

3 Section-Headings - Name of Charity of selected video

1-2 paragraphs for each section which addresses the questions above

Use APA citations for each video (see examples on how to cite a video below)

For help with APA style: <https://owl.english.purdue.edu/owl/resource/560/01/>

Example for citing videos:

In-Text Citation (Paraphrase):
(Norton, 2006)

In-Text Citation (Quotation):
(Norton, 2006)

References:

Norton, R. (2006, November 4). *How to train a cat to operate a light switch* [Video file]. Retrieved from <http://www.youtube.com/watch?v=Vja83KLQXZs>

Grading: possible 22 points to be combined with "Where's the Money?" quiz (8 points) for a total of 25 points
Where's the Money - 8 points (8/25 = 32%)

Section 1 - questions answered clearly and eloquently - 4 points (4/25 = 16%)

Section 2 - questions answered clearly and eloquently - 4 points (4/25 = 16%)

Section 3 - questions answered clearly and eloquently - 4 points (4/25 = 16%)

Writing style/grammar - 3 points (3/25 = 12%)

APA style/format/citations - 2 (2/25 = 8%)

Summary:

Where's the Money? Comprehension - 32%

3 Sections Analysis - 48%

Writing/APA Mechanics - 20%

Submit your paper online to Inspirational Videos Assignment found in the Course Information link on Blackboard.

Discussion #2 – Due November 13 (25 points) (found under Discussion Link)

Develop a Personal Philosophy of Philanthropy –

Use the “Developing a Personal Philanthropy Plan to help you define what elements are important to you when you consider charitable giving. Write a personal philanthropy plan in the style of the three samples provided: Include a mission statement and Guiding Principles. Submit your plan online as a thread in Discussion #2. Submit your plan by **Thursday, 11:59 p.m., November 3rd**. Then read your fellow students plans and comment before **November 6 at 11:59**. Please note every students should have TWO postings: the personal philosophy plan and a commentary on your fellow students plan. The commentary should include a review of a fellow student’s plan you find understandable and well-written. Detail what elements make their plan compelling. The commentary post need only consists of 5 – 10 well-constructed sentences.

Discussion #3 – Due Dec 3 (25 Points)

Re

Projects:

Case Statement – Due November 19

Grant – Due November 23

Annual Fund Plan Assignment/Presentation:

You are required to produce a fundraising plan for the annual fund of a nonprofit or charitable organization of your choice.

Your annual fund plan should be written in order to be read and implemented by a senior member of the management team. It is thus a practical document that should utilize the theory you will learn during the course

to inform the analysis you undertake. While this is a practical document you must still reference any course material or ideas that you use in your plan.

The following headings may be useful in guiding the structure of your assignment – and further advice will be provided throughout the course. As we will discuss in class, fundraising plans can take many different forms, but if you’re new to the topic you will find these headings useful in guiding your work.

- a) Cover Page – to include title, time period addressed in the plan, author, name of organization/product and, if appropriate, any confidentiality restrictions.
- b) Executive Summary – one page summary of the main proposals in the fundraising plan
- c) Table of Contents – detail of key sections and sub-sections.
- d) Fundraising Audit
- e) SWOT Analysis
- f) Summary of Key Issues
- g) Assumptions (if any)
- h) Fundraising Objectives
- i) Fundraising Strategies
- j) Tactics
- k) Budget
- l) Schedule
- m) Responsibilities (if applicable)
- n) Monitoring/Control
- o) Contingencies (if applicable)
- p) Appendices

Your approach throughout should reflect the highest standards of professional practice and should be guided by the AFP code of ethics.

For your guidance, marks will generally be awarded in accordance with the following rubric, although extra credit may be given at the discretion of the Professor, where appropriate:

| Content | Marks (%) |
|--|-----------|
| Fundraising Audit / SWOT / Summary of Key Issues | 30 |
| Specification of Fundraising Objectives | 10 |
| Specification of Fundraising Strategy | 20 |
| Specification of Fundraising Tactics | 20 |
| Specification of budget/schedule | 10 |
| Quality and appropriateness of presentation | 10 |

Grading Matrix:

| Activities/Assignments | Value (points) | TBA |
|------------------------|----------------|-----|
| Discussions (1-3) | 75 | 15% |
| Case Statement | 100 | 20% |
| Grant | 100 | 20% |
| Annual Plan | 200 | 40% |

| | | |
|---------------|------------|-------------|
| Team Work | 25 | 5% |
| Total: | 500 | 100% |

Grade Determination

A = 90% or better

B = 80 – 89 %

C = 70 – 79 %

D = 60 – 69 %

F = less than 60%

University Policies and Procedures

Students with Disabilities (ADA Compliance):

Chapter 7(7.004) Disability Accommodations for Students

The University of North Texas at Dallas makes reasonable academic accommodation for students with disabilities. Students seeking accommodations must first register with the Disability Services Office (DSO) to verify their eligibility. If a disability is verified, the DSO will provide you with an accommodation letter to be delivered to faculty to begin a private discussion regarding your specific needs in a course. You may request accommodations at any time, however, DSO notices of accommodation should be provided as early as possible in the semester to avoid any delay in implementation. Note that students must obtain a new letter of accommodation for every semester and must meet/communicate with each faculty member prior to implementation in each class. Students are strongly encouraged to deliver letters of accommodation during faculty office hours or by appointment. Faculty members have the authority to ask students to discuss such letters during their designated office hours to protect the privacy of the student. For additional information see the Disability Services Office website at <http://www.untDallas.edu/disability>. You may also contact them by phone at 972-338-1777; by email at UNTDdisability@untDallas.edu or at Building 2, room 204.

Blackboard Learn Accessibility Statement:

University of North Texas at Dallas is committed to ensuring its online and hybrid courses are usable by all students and faculty including those with disabilities. If you encounter any difficulties with technologies, please contact our ITSS Department. To better assist them, you would want to have the operating system, web browser and information on any assistive technology being used. Blackboard Learn course management system's accessibility statement is also provided: <http://www.blackboard.com/Platforms/Learn/Resources/Accessibility.aspx>

NOTE: Additional instructional technology tools, such as Turnitin, Respondus, Panopto, and publisher cartridge content (i.e. MyLab, Pearson, etc.) may NOT be fully ADA compliant. Please contact our Disability Office should you require additional assistance utilizing any of these tools.

Course Evaluation Policy:

Student's evaluations of teaching effectiveness is a requirement for all organized classes at UNT Dallas. This short survey will be made available to you at the end of the semester, providing you a chance to comment on how this class is taught. I am very interested in the feedback I get from students, as I work to continually improve my teaching. I consider students' evaluations to be an important part of your participation in this class.

Assignment Policy: (According to the instructor's discretion while working in concert with the division/program's guidelines).

Exam Policy: (Online exams and the ability to retake is solely at the instructor's discretion). **NOTE:** Online exams may be proctored on campus per instructor's discretion.

Academic Integrity:

Academic integrity is a hallmark of higher education. You are expected to abide by the University's code of Academic Integrity policy. Any person suspected of academic dishonesty (i.e., cheating or plagiarism) will be handled in accordance with the University's policies and procedures. Refer to the Student Code of Academic Integrity at http://www.untDallas.edu/sites/default/files/page_level2/pdf/policy/7.002%20Code%20of%20Academic_Integrity.pdf for complete provisions of this code.

Academic dishonesty includes, but is not limited to, cheating, plagiarizing, fabrication of information or citations, facilitating acts of dishonesty by others, having unauthorized possession of examinations, submitting work of another person or work previously used without informing the instructor, or tampering with the academic work of other students.

Web-based Plagiarism Detection: Please be aware in some online or hybrid courses, students may be required to submit written assignments to Turnitin, a web-based plagiarism detection service, or another method. If submitting to Turnitin, please remove your title page and other personal information.

Classroom Policies

Online Attendance and Participation:

The University attendance policy is in effect for this course. Class attendance in the Blackboard classroom and participation is expected because the class is designed as a shared learning experience, and because essential information not in the textbook will be discussed in the discussion board. Online presence and participation in all class discussions is essential to the integration of course material and your ability to demonstrate proficiency. .

Attendance for this online or hybrid course is considered when you are logged in and active in Blackboard, i.e., posting assignments, taking quizzes, or completing Discussion Boards. To maintain financial aid award eligibility, activity must occur before the census date of the session or term of the course. Refer to <http://www.untDallas.edu/registrar> for specific dates. If you are absent/not active in the course shell, it is YOUR responsibility to let the instructor know immediately, upon your return, the reason for your absence if it is to be excused. All instructors must follow university policy 7.005 covering excused absences; however, it is the instructor's discretion, as outlined in the course syllabus, of how unexcused absences may or may not count against successful completion of the course

Inclement Weather and Online Classes: Online classes may or may not be effected by campus closures due to inclement weather. Unless otherwise notified by your instructor via e-mail, online messaging, or online announcement, students should assume that assignments are due as scheduled.

Online "Netiquette:

In any social interaction, certain rules of etiquette are expected and contribute to more enjoyable and productive communication. Emails, Discussion Board messages and/or any other forms of written communication in the online environment should use proper "netiquette" (i.e., no writing in all caps (usually denotes yelling), no curse words, and no "flaming" messages (angry, personal attacks).

Racial, ethnic, or gender slurs will not be tolerated, nor will pornography of any kind.

Any violation of online netiquette may result in a loss of points or removal from the course and referral to the Dean of Students, including warnings and other sanctions in accordance with the University's policies and procedures. Refer to the Student Code of Student Rights Responsibilities and Conduct at <http://www.untDallas.edu/osa/policies>. Respect is a given principle in all online communication. Therefore, please be sure to proofread all of your written communication prior to submission.

Diversity/Tolerance Policy:

Students are encouraged to contribute their perspectives and insights to class discussions in the online environment. However, offensive & inappropriate language (swearing) and remarks offensive to others of particular nationalities, ethnic groups, sexual preferences, religious groups, genders, or other ascribed statuses will not be

tolerated. Disruptions which violate the Code of Student Conduct will be referred to the Dean of Students as the instructor deems appropriate.

Technology Requirements: In order to successfully access the materials in an online or hybrid course, UNT Dallas advises that your computer be equipped with the minimum system requirements.

Blackboard Learn 9.1 is the platform software for this course. Blackboard Learn supports major web browsers such as Windows Internet Explorer, Apple Safari, Mozilla Firefox, and Google Chrome. However, since the latter two are updated continually, some recent versions may not be compatible. If you experience difficulty accessing or using components of the course, try using Internet Explorer. Also, no matter what browser you use, always enable pop-ups. For more information see:

- <http://www.untdallas.edu/dlit/ecampus/requirements>
- <https://blackboard.secure.force.com/public/articleview?id=kAB700000008Oom>
- https://learn.unt.edu/bbcswebdav/institution/BrowserCheck/check_full.html