Masaryk University – Brno

Department of Public Economics - Faculty of Economics and Administration

Nonprofit Capacity Building: Fundraising

Syllabus – Fall Semester 2012

Instructor:	Julie Pietroburgo, Ph.D.
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Language of Instruction:	English
Teaching Schedule:	Monday, 7:40-9:10; 9:20 – 10:50
Office Hours:	Tuesday, 10:00-12:00
Exam Period:	December 3, 2012

Course Description: The nongovernmental sector in the Czech Republic is in a period of transition. Significant challenges face Czech NGOs including reduced support from EU funds, increased competition for donations, redirection of grant programs toward academia and business, and declines in foundation/corporate contributions. This course addresses capacity building in NGOs with a specific focus on Fundraising. The course discusses methods for cultivating tangible and intangible support including strategies and tools necessary to preparing fundraising appeals and grant requests and management of fundraising functions.

Course Objectives: The Fundraising course is an introduction to, and survey of, the institutions, processes, and issues involved in the acquisition of tangible and intangible resources by nongovernmental organizations. The primary goal of this course is to assist students in developing a broad base of knowledge about the management and direct fundraising skills that will enable them to successfully acquire the resources needed to fulfill the mission of an organization. Ultimately, the goals of this course are to facilitate student integration and application of this knowledge for purposes of:

1. *Understanding fundraising within the broader context of organizational management, development and philanthropy.* The course looks at the concepts underlying the behavior of individuals, groups and organizations involved in giving and getting funds for charitable purposes. Students will come to understand that fundraising practice is the means to many ends. First and foremost, it helps to satisfy the needs and desires of its donors. Second, it aids in fulfilling the mission and vision of its recipients whose good works benefit the communities they serve. Third, it provides the opportunity for citizens to be involved in the causes of their choice through voluntary leadership and support roles.

2. *Identifying the fundamental principles of successful fundraising practice.* Development and fundraising as areas of professional practice are driven by a number of underlying principles. These principles concern the governance and ethics of fundraising as well as the time-tested philosophies of what works. Prerequisites that predict success are an understanding that people give to people, that people give

relative to their means, that those closest must set the pace and that there must be a match between the prospect, the project, the time and the method of fundraising.

3. *Formulating fundraising plans as elements of broader organizational strategies, structures and operations.* Students will learn that fundraising requires a plan. Fundraising without planning, without a strong, committed group of board members, staff and volunteers and without a workable organizational structure is practically impossible. A sound fundraising plan considers all of the critical components and provides a map and itinerary for raising the money an organization needs. An overall plan for fundraising must be developed which compellingly states the case for support, takes stock of the organization's strengths and weaknesses, works within the existing governance structure and is aligned with the broader mission and goals of the organization.

4. *Recognizing sound management of the fundraising function.* In addition to a broad strategy, students will find that successful fundraising entails attention to the "nuts and bolts" of managing this unique function. From cultivating an ongoing personal relationship with prospects and donors, to efficiently collecting, organizing and analyzing voluminous data, to preparing persuasive communications pieces, managers must be concerned with how they are achieving their results and the messages they are communicating.

5. *Building familiarity with and implementing effective fundraising methods and techniques.* A wide range of fundraising options hold potential for raising critical resources for organizations, yet successful selection and use of these methods requires a understanding of the match between the organization and the method. Among the many versatile tools in the fundraiser's toolbox include direct mail campaigns, internet and telephone solicitation, personal solicitation, planned giving and special events. These tools may be used within the context of annual giving programs as well as major giving campaigns. In addition, the basics of grant preparation will be discussed.

6. *Assessing fundraising effectiveness.* As reflective practitioners, students will learn that NGO managers must continually assess fundraising performance, comparing actual results to those projected in the plan and those necessary for organizational viability.

7. *Gaining perspective on contemporary challenges and innovations that are changing the shape of fundraising activity in the nongovernmental sectos.* Use of fundraising consultants, reliance on internet fundraising, fundraising collaboration among nongovernmental entities and for-profit entities are but a few of the trends that are impacting how resources are acquired by nonprofit organizations. In addition, NGOs are undertaking fundraising efforts in environments characterized by increased competition, heightened regulation, and greater concern over ethical practice. Students will learn that those engaged in fundraising will craft more effective strategies by addressing these contemporary issues in proactive and responsible ways.

Teaching Philosophy and Methodologies: The course is taught in English and is set on specialized foreign literature sources (a limited number of these texts will be available through the instructor). However, students are not required to use the original textbooks to prepare for the course. Instead, after each lecture, students will be provided with handouts and slide presentations containing all the basic knowledge which needs to be mastered for successful performance on the homework assignment and the exam.

I believe that student learning occurs most effectively in an active and collaborative environment. As a teacher, I intervene in this process by promoting such an environment and through my role as a facilitator, personal example and resource. While I believe it important to impart detailed knowledge and establish learning goals and expectations, I also seek to direct students by asking questions, exploring options, suggesting alternatives, fostering collaborative learning and encouraging students to develop personal criteria to make informed choices. My goals for students are not to just master a given body of course content, but to develop process skills that will serve them throughout their professional lives such as critical thinking, writing and problem solving.

Literature:

Seltzer, M., *Securing Your Organization's Future: A Complete Guide to Fundraising Strategies,* The Foundation Center, 2001. Chapters to be made available on-line.

Add'l. Readings: In addition to these texts, other readings from selected academic journals and practitioner sources may be made available through handouts and on-line sources.

Course Requirements:

Homework: Two specific exercises dealing with fundraising tactics will be completed by students. As such, students will be utilizing fundraising planning tools (covered within course materials) to prepare proposals for fundraising plans and tactics appropriate for specific case scenarios. Each homework assignment will be worth 50 points.

Exam: As a final course requirement, students will complete an exam which will cover the following: 1) the context for capacity building and fundraising, 2) principles of fundraising practice, 3) development of fundraising plans, 4) management of the fundraising function, 5) fundraising methods and techniques, 6) assessing fundraising effectiveness and 7) contemporary challenges and issues facing fundraising practitioners. Questions on the exam will be taken from course lectures and the assigned readings. This exam will be worth a maximum of 100 points.

Class Participation: Students are expected to remain current with the required readings. If called upon in class, students are expected to comment on, and respond to questions regarding material covered in class and the required readings. Attending each class is imperative to mastering course concepts and participating in class discussions.

The overall course grade of Pass or Fail will be computed by converting into a grade-point score the total number of points gained from homework assignments and the exam.

<u>Course Outline</u>

Week 1 Overview of Philanthropy, Development and Fundraising
     Defining Terms
     Articulating Mission, Needs, Goals, Objectives and Methods
     Read: Chapter 1 (on-line)

Week 2 Capacity Building Framework
     Internal and External Environments for Fundraising
     Essential Ingredients for Fundraising
     Read: Chapter 3(on-line)

Week 3 Fundraising Cycles
     Creating the Fundraising Plan
     Read: Chapter 4 (on-line)

Week 4 Identifying, Understanding and Evaluating Donors
     Trends Impacting Fundraising
     Read: Chapter 6 (on-line)

Week 5 Fundraising Principles
     Developing Case Statements
     Fundraising Management: Information and Relationships
       - Managing the Fundraising Function
       - Board/Staff Relations in Fundraising
       - Database tools
     Read: Chapter 7 (on-line)

Week 6 Fundraising Tactics:
     Annual Giving
     Direct Mail
     Special Events
     Read: Chapters 8 and 9 (on-line)

Week 7   Fundraising Tactics:
                Personal Solicitation
                Internet Solicitation
                Read: Chapters 11 and 13 (on-line)
                Assignment 1 due in class

Week 8   Fundraising Tactics:
                Major Giving
                Capital Campaigns
                Planned Giving
                Prospect Research
                Read: Chapter 12 (on-line)

Week 9   Grant Writing Basics
                Read: Chapter 15 (on-line)
                Assignment 2 due in class

Week 10   Exam (In class)