

**Management 6083 – Comprehensive Fund Development for Nonprofit  
Organizations  
Summer 2011 – CRN 5273**

<b>COURSE TITLE BLACKBOARD SITE</b>	MGT 6083 – Comprehensive Fund Development for Nonprofits Summer 2011 – <a href="http://my.ltu.edu">http://my.ltu.edu</a> and select CRN 5273
<b>INSTRUCTOR</b>	Mike Montgomery Montgomery Consulting Contact Information mjm12940@aol.com Phone: 248-224-7330  Online Office hours: Wed 12-2pm and Thurs 7-9pm
<b>SCHEDULE</b>	May 18, 2011 – July 28, 2011  Refer to <a href="http://www.ltu.edu/registrars_office/calendar_final_exam.index.asp">http://www.ltu.edu/registrars_office/calendar_final_exam.index.asp</a> for the last date to withdraw and other important registration related information.
<b>LEVEL/ HOURS PREREQUISITE</b>	MBA or Graduate Certificate in Nonprofit Management credit 3 semester hours
<b>REQUIRED TEXT</b>  (See Blackboard for additional resources)	<i>Principles &amp; Techniques of Fund Raising</i> The Fund Raising School Center on Philanthropy of Indiana University. <b><u>Text is NOT available in Bookstore.</u></b>  The text for MGT6083 is a special one (a binder and flash drive) that has been ordered. It will be available only through the LTU Online Office. Cost is \$150.00. Contact <a href="mailto:elarning@ltu.edu">elarning@ltu.edu</a> (248) 204 – 2380 to arrange to purchase your copy.  <i>The IU text is the ONLY material you are expected to purchase for this class – everything else is available through the class BB area.</i> The supplemental text is Michael J. Montgomery, <i>Fundraising for Community Projects and Agencies</i> (2009). The supplemental text is in BlackBoard under Module 0. Save to your hard drive or print out which (I am told) can be done quickly/cheaply in the LTU Library.
<b>ADDITIONAL RESOURCES</b>	LTU Online student resources: <a href="http://www.ltu.edu/ltuonline/">http://www.ltu.edu/ltuonline/</a>
<b>TECHNICAL SUPPORT</b>	Technical support for using Blackboard is provided by the Helpdesk. Visit <a href="http://www.ltu.edu/ehelp">www.ltu.edu/ehelp</a> or 248.204.2330 or <a href="mailto:helpdesk@ltu.edu">helpdesk@ltu.edu</a> . Send the Help Desk a form detailing any issues by clicking here <a href="http://tinyurl.com/3yqrvne">http://tinyurl.com/3yqrvne</a> .

**COURSE SCHEDULE FOR TRADITIONAL & COLLEGE OF MANAGEMENT SEMESTER COURSES**

This fully online course begins with a partial week online course orientation period to familiarize yourself with the online learning environment and to meet online or via the phone with your instructor. Each subsequent week starts on a Monday and ends on a Sunday.

**Using the IU Fundraising School Material --** *Over the past several editions of Principles and Techniques of Fundraising, a great deal of the material has been shifted OUT of the white binder. Most of what is still in the binder are things the authors have concluded people especially want to touch and hold. As a result, the only complete version of the IU material is now on the FLASHDRIVE that accompanies the binder. In the possible event that pagination has changed yet again, you should still be able to rely on section and chapter numbers and names to find the week’s material.*

Dates	Modules	Topics / Readings	Assignments Due
Prior to Semester Start and May 18 – May 22	Module 0	Online Learning & Course Orientation a. Course Orientation b. The “Case” Method for assignments c. Overview of Course/Text  Reading: <i>IU Principles and Techniques of Fundraising</i> : pages xi – xxiii. (older editions acceptable but Red in color and not identical in pagination)  Montgomery, <i>Fundraising for Community Agencies and Projects</i> (browse)	Course orientation Instructor Conversation (Personal Learning Plan)
Week of May 23 – May 29	Module 1	Introduction to Fundraising and the NPO Community A. The Nonprofit Community B. Fundraising C. Ethical Concerns in Fundraising D. Language of Fundraising  Reading: <i>Principles and Techniques</i> : Section I, Chapters 1,2,3 and page 45-55. Montgomery, pages ii– 16.	Bb - Discussion on ethics question.  Written Description of “agency” student will use for assignments.
Week of May 30 – June 5	Module 2	Institutional Readiness for Fundraising:  a. Marketing & Communications b. Constituencies c. Role of Organization Boards in Fundraising d. The Fundraising Case Statement e. Fundraising Process and Vehicles  Reading: <i>Principles and Techniques</i> : Section II, Chapter 4 & 5 <i>Principles and Techniques</i> : IV, Chapter 12 & 23 Montgomery: 60 – 66	Bb Discussion on readiness.  Prepare “case points” outlining what a case statement for your agency might say in order to urge prospective donors to give.

<p>Week of June 6 – June 12</p>	<p>Module 3</p>	<p>Fundraising from Individual Donors <i>and Intro to Fundraising</i></p> <p>a. Annual &amp; Broad-based Giving (Direct Mail, Telephone, Internet) b. Intermediate Giving c. Prospect Research d. A <i>healthy</i> role for Events in Fundraising</p> <p>Reading: <i>Principles and Techniques</i> Section IV, Chapter 13 – 18, Chapter 25 (process) &amp; 28 (resources) Montgomery: 27 - 38 Chronicle of Philanthropy Article on Online Fundraising</p>	<p>Bb Discussion of appropriateness of different fundraising vehicles</p> <p>Draft a broad-based solicitation device (letter, telephone script, push e-mail)</p>
<p>Week of June 13 – June 19</p>	<p>Module 4</p>	<p>Fundraising from Individual Donors <i>and Introduction to Fundraising</i></p> <p>a. Major Giving b. Asking for Gifts c. Planned Giving</p> <p>Reading: <i>Principles and Techniques</i>: Section VII, Chapter 29 &amp; Section IV, Chapter 20 Montgomery: 17 – 27 David Owen, “State of the Art Panhandling,” <i>Harper’s Magazine</i> (1982).</p>	<p>Bb Discussion on how to integrate planned giving into a fundraising program.</p> <p>Prepare written plan for increasing giving by Individual Donors to your agency.</p>
<p>Week of June 20 – June 26</p>	<p>Module 5</p>	<p>Fundraising from Foundations <i>and Fundraising Writing</i> (and, by extension, from <i>competitive</i> government grant programs)</p> <p>a. Foundations: What are? What do? Types of Support b. How to research? c. Cultivating Foundations d. Solicitation</p> <p>Reading: Montgomery: 75-115 <i>Principles and Techniques</i>: Section VI, Chapters 25, 27 &amp; 28 (review)</p>	<p>Bb Discussion on Foundations.</p> <p>Prepare a written Foundation Prospect Profile</p>
<p>Week of June 27 – July 3</p>	<p>Module 6</p>	<p>Fundraising from Foundations and Fundraising Writing (and, by extension, from <i>competitive</i> government grant programs)</p> <p>a. Proposal Writing b. Ethical concerns in grant seeking/administration c. Stewardship &amp; Reporting d. Renegotiation e. Surviving a failed grant/rebuilding trust</p> <p>Reading:</p>	<p>Bb Discussion on ethical Grant Seeking.</p> <p>Prepare a simple / brief proposal to a foundation. – or --Prepare fundraising plan for Foundations</p>

		Montgomery 75-115 (review), Also 140 – 158 Montgomery, <i>ROTO – Restriction Offset to Operations</i> , (LTU: 2009).	
k of July 4 – July 10	Module 7	Fundraising from Corporations <i>and Donor Recognition</i>  a. Why do they give? Types of Support? b. Critical Role of Recognition in Corporate Giving c. Researching Corporate Prospects  Reading: <i>Principles &amp; Techniques</i> : Section IV, Chapter 26 & 28 (review) Montgomery: 39-46  <a href="http://www.gm.com/company/gmability/community/index.html">http://www.gm.com/company/gmability/community/index.html</a>	Bb Discussion on Corporate giving.  Corporate prospect profile
Week of July 11 – July 17	Module 8	Fundraising from Corporations <i>and Donor Recognition</i>  a. Gifts and Grants b. Sponsorship! Is it really possible to “double dip” corporations? c. Cause-related Marketing  Reading: Chronicle of Philanthropy Article on Sponsorship and Marketing Explore IEG "Strategic Philanthropy Study" on that company's Web site, at <a href="http://www.sponsorship.com/">http://www.sponsorship.com/</a>	Bb Discussion on how Corporate Giving is recognized.  Corporations fundraising plan for your agency.  -- or --  <i>Sponsorship</i> proposal seeking corporate support of some aspect of your agency or its work
Week of July 18 – July 24	Module 9	Management of the Fundraising Process,  a. Functions of the Development Office b. Budgeting for Fundraising c. Human Resources d. Stewardship -- “Operational” and “Strategic”  Reading - texts: a) <i>Principles &amp; Techniques</i> Section III, Chapters 7, 8, 9 (Management) Section V, Chapters 22, 23, 24 (Human Resources) Montgomery: i, 55-59 & 72-74. b) Other Chronicle of Philanthropy articles on fundraising as a career <a href="http://www.giving.umich.edu/careers/index.html">www.giving.umich.edu/careers/index.html</a>	Bb Discussion on Campaigns  Prepare a brief written description (1 or 2 pp) of the Development Department needed to implement your fundraising plans.

Week of July 25 – Jul 28	Module 10	B. The Role of Campaigns in a Healthy Fundraising Program and Course Wrap-up  a. Role of Campaigns b. Wrap-up  Readings: <i>Principles &amp; Techniques</i> : Section IV, Chapter 19 (Campaigns) Montgomery p 10 & 11 and 117 – 118 (“Countdown to Fundraising”) <a href="http://waynefirst.wayne.edu/">http://waynefirst.wayne.edu/</a>	THIS IS THE “DROP DEAD” DATE – ALL ASSIGNMENTS MUST BE COMPLETED BY JULY 28.
<b>THIS IS A 10 WEEK SEMESTER. THE SEMESTER HAS BEEN CONDENSED TO INCLUDE ALL NORMAL COURSEWORK AND ASSIGNMENTS.</b>			

### STUDENT EVALUATION

The course has 3 major assignments weekly assignments and discussions totaling 100 points. Letter grades are awarded based on the total number of points achieved. Points are deducted for late assignments.

Assignments	Points
Plan for Increasing Fundraising from Individuals	20%
Plan for Increasing Fundraising from Foundations or A Basic Proposal to a Foundation	20%
Plan for Increasing Fundraising from Corporations or A Corporate Gift or Sponsorship Proposal	20%
The remaining 40% will come from weekly assignments some of which are short but formal others of which are less formal.	40%
Total	100%

Class Points	Letter Grade
96 and above	A
90 – 95	A-
87 – 89	B+
83 – 86	B
80 – 82	B-
77 – 79	C+
73 – 76	C
70 – 72	C-
61 – 70	D (Undergrad Only)
60 and below	E

*Note: Grades lower than a “B” fall below the LTU graduate standard*

### EDUCATIONAL GOALS

This course has been designed as an introduction to fundraising for current/future Non Profit Organization Managers. It will meet the initial professional training needs of working-level fundraisers, but is primarily focused on preparing students for the eventual (or current) challenge of leading nonprofit organization fundraising as an agency Chief Development Officer, COO or CEO. To support this mission, assignments are highly-applied and students need to select (or make-up) a Nonprofit Organization to serve as the topic of their assignments.

### STUDENT LEARNING OBJECTIVES / OUTCOMES

Specific learning objectives by week are outlined in the lectures. There are also five overarching learning objectives for students, specifically that they come to: 1) Understand the general fundraising process, 2)

Master the language, techniques and process for raising funds from Individual Donors, 3) Master the language techniques and process for raising funds from Foundations (and by extension units of government), 4) Master the language, tools and techniques for raising funds from Corporations, and 5) Understand the basic challenges of managing the Fundraising Process and the special challenges of Leading Professional Fundraisers.

## PREREQUISITE SKILLS

This is a graduate course requiring a bachelor's degree or foreign equivalent. Because this course is open to Graduate Certificate Program as well as MBA students, there are no specific prerequisites in Management but students should have solid mastery of written English and a good understanding of spoken English (lectures are PowerPoint presentations with narration).

## INSTRUCTIONAL METHODS AND COURSE ORGANIZATION

This summer online version of 6083 uses the 10-week summer format by combining sessions from the original 14-week version of the class. This has generally been done by giving the first session under a given topic an unusually long list of topics and readings. Feel free to balance this out to fit your own needs but, in any event, please complete all readings and assignments on any topic by the conclusion of the final module on that topic.

Course Organization:

- Module 0 is an introduction to the course.
- Modules 1 & 2 focus on the philanthropic tradition and institutional readiness for fundraising.
- Modules 3 & 4 focus on raising money from Individuals and an *Introduction to Fundraising*.
- Modules 5, 6 & 7 deal with raising money from Foundations and *Fundraising Writing*.
- Modules 8 & 9 discuss raising money from Corporations and *Donor Recognition*.
- Module 10 concludes course by bringing the various themes, techniques and issues together in a module on Managing the Fundraising Effort – including where periodic Fundraising Campaigns fit in a healthy and effective fundraising program.

**Blackboard Learning Environment** – Blackboard at my.ltu.edu contains the syllabus, all assignments, reading materials, streaming videos, narrated PowerPoint mini-lectures, podcasts, written lecture notes, chapter quizzes, links to Web resources, and discussion forums. You will submit all assignments via Blackboard, and are expected to participate regularly in discussion topics. Please take time to familiarize yourself with the organization of the Blackboard site. You will want to check the site frequently for announcements reminding you of new resources and upcoming assignments.

**Student/Instructor Conversations** – Students keep in touch with the instructor via e-mail messages, telephone conference calls, and IM conversations.

**Self-Assessments** – Pre- and post- self-assessment tools will help students measure their entering skills and progress during the course.

**Required Reading** – Textbook chapters should generally be read according to the schedule outlined in the syllabus. Material from the chapters will be discussed in the online lectures and in weekly discussions on the discussion board.

**Assignments** – This class has deliberately been designed as *light* on reading but *heavy* on analysis/thinking/planning. Because this is an online course, the results of that work will generally need to be put into written form in order to be shared with the instructor. There are three classes of assignments:

- 3 Major Assignments
- 6 Shorter Assignments
- Weekly (Modules 1-10) BlackBoard Discussions

## CLASS POLICIES AND EXPECTATIONS

*I plan to offer you a valuable learning experience, and expect us to work together to achieve this goal. Here are some general expectations regarding this course:*

This class is a little different than any other of which I am aware in that a limited degree of plagiarism is not only permitted but is encouraged. This permission, however, is limited to those assignments where you are to prepare fundraising raising materials (telephone scripts, solicitation letters, etc). For those assignments (and only those assignments), you may draw without footnoting on information and even limited amounts of “boilerplate” text coming from the agencies that you are making the topic of your assignments. This is because NPOs routinely draw on their own previous written material in order to “keep their story straight” and maintain consistent message and themes. You may not, however, present entire documents written by others as your own work.

Each student has a LTU email account. If you wish to use a different email address for this course, please **change your email address in Blackboard under “Blackboard Tools”, then “Personal Information”** and send an email to me so I can store your address in my email directory.

Readings, discussion forum participation, and written assignments must be completed according to the class schedule. It is important to contact the instructor as needed to discuss personal needs regarding course requirements and assignments.

It is essential that all students actively contribute to the course objectives through their experiences and working knowledge.

All assignments must be submitted on schedule, via Blackboard, and using Microsoft Office compatible software. If you need to submit an assignment via email, contact the instructor in advance.

Assignments must be completed to an adequate standard to obtain a passing grade. Requirements for each assignment are detailed in this syllabus.

Be prepared to log into Blackboard at least once each day. Please focus your online correspondence within the appropriate Blackboard discussion forums so that your colleagues can learn from you.

At midterm and at the end of the course, you will be invited to participate in a University evaluation of this course. Your feedback is important to the University, to LTU Online, and to me as an instructor, and I encourage you to participate in the evaluation process.

It is important for you as students to know what to expect from me as your instructor:

- I will be available to you via e-mail and phone (during scheduled hours), and will promptly reply to your messages.
- I will be available to you for face-to-face appointments as requested.
- I will maintain the Blackboard web site with current materials, and will resolve any content-related problems promptly as they are reported to me.
- I will send out a weekly e-mail update to all class members to guide upcoming work and remind you of assignment due dates.
- I will return all assignments to you promptly through the Blackboard tool and will include individualized comments and suggestions.
- I will hold our personal written or verbal communications in confidence. I will not post any of your assignments for viewing by the class without requesting your approval in advance.
- I will treat all members of the class fairly, and will do my best to accommodate individual learning styles and special needs.

- If any of these points need clarification, or when special circumstances arise that require my assistance, please contact me so that we can discuss the matter personally.

### PRACTICAL GUIDELINES FOR CLASS LOAD EXPECTATIONS

A three-credit course generally requires at least nine hours per week of time commitment. Here are some practical guidelines to help schedule your time commitments for this online course:

- A 14-week semester (the summer semester is compressed into 10 weeks) would require at least 126 hours of time commitment to successfully complete all readings, activities, assignments, and texts as described in this syllabus.
- You should reserve at least 8 hours per week to read the required textbook chapters and resources, participate in online discussions, review presentation materials, and work through online quizzes. This effort will total at least 70 hours over the course of the semester.
- You should organize your remaining time to roughly correspond with the point value of each major assignment. This means that you should plan to spend at least:
  - 40 hours or more working on the three major assignments.
  - 12 to 16 hours working on discussions and weekly assignments.

These guidelines may not reflect the actual amount of outside time that you – as a unique individual with your own learning style – will need to complete the course requirements. The number of hours each week will vary based on assignment due dates, so please plan ahead to insure that you schedule your academic, work, and personal time effectively. The following graphic can be used to guide you in planning your weekly course work to remain on schedule:

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Read text chapter(s) and other assigned material						
			Participate in weekly online discussion on discussion board			
Complete written assignment for the week						
Instructor Communications -- by email as needed. Scheduled office hours held by telephone 10am-12pm Wednesday & 7-9pm Thursday Messages can be left/special problems can be discussed at other times at (248) 224-7330						

### ASSIGNMENT DETAILS

Course assignments and evaluation criteria are detailed below. Please review these requirements carefully. See the section Academic Resources / Assessment Guidelines for information about assessment of written and oral presentations.

Details for all assignments are shown below. Please note that you should not submit any assignments to the Blackboard "Digital Drop Box." All assignments are submitted using the Blackboard "Assignments" function. Some assignments are also posted to the Blackboard Discussion Forum for student comments.

#### Assignments (90 Points)

**Overview** – Details for the assignments listed below appear in the relevant BlackBoard module under "assignments." Please note that you should not submit any assignments to the Blackboard "Digital Drop



Box.” All assignments are submitted using the Blackboard “Assignments” function. Participation in the Blackboard Discussion Forum is considered to be a weekly assignment.

### **Deliverables and Evaluation**

Major Assignments (60% of grade) -- The three sections of the course that focus on how to raise money from particular types of donors (Individuals, Corporations and Foundations) will each conclude with a major assignment worth 20% of the course grade.

- Plan for Increasing Fundraising from Individuals (20%)
- Plan for Increasing Fundraising from Foundations *or* A Basic Grant Proposal\* (20%)
- Plan for Increasing Fundraising from Corporations *or* A Corporate Gift or Sponsorship Proposal\* (20%)

Minor/Weekly Assignments (30% of grade) - The next 30% will come from weekly assignments some of which are short but formal others of which are less formal. These are listed below:

- “Agency” Description -- sets topic of subsequent assignments (5%)
- “Case Points” (5%)
- Broad-based Solicitation Device\* (5%)
- Foundation Prospect Profile\* (5%)
- Corporate Prospect Profile\* (5%)
- Description of a Development Department for your agency\* (5%)

### **Agency for Course Assignments**

Every student will need a nonprofit “agency” that will serve as the topic of this course’s highly-applied, thoroughly practice-oriented assignments. If you are currently working or volunteering at a non-profit, that agency is the most logical for you to use. If you are not currently at a non profit, you have two options – contact someone you know in the community and see if it would be possible for you to have sufficient access to that agency in order to do the assignments as though you were working there. Failing that, make up an agency that would have as its work some type of educational, scientific or charitable activity about which you personally feel strongly. Lecture materials and assignment details for Module O set some parameters for those who elect to “make up” their agencies. Made-up agencies, however, should be only be considered as a “last resort.”

Assignments are graded on the quality of their analysis and demonstration that students are mastering the course material. Clear, concise, grammatical text is much appreciated for all assignments. The quality of writing, however, will be a factor in grading only for those assignments noted above with an asterisk (\*).

### **Online Participation (10 points)**

Weekly discussion/postings (10% of grade) -- Each week, draw on readings and lectures to react to a proposition, analyze an issue or answer a question the instructor has posted. Read the postings of fellow students and comment (agree, disagree or go beyond) the work of at least two each week.

- Read and Post to the Instructor’s Bb Posting by Midnight WEDNESDAY.
- Return to Bb and read student postings. Comment on at least 2 of your fellow student’s comments by midnight FRIDAY.
- Return to Bb, read student comments and the Instructor’s summation – This material should be available to you Sunday.

## **SYLLABUS ADDENDA**

Please see the LTU Online “Current Students” web site <http://www.ltu.edu/ltuonline/> for comprehensive information about Lawrence Tech’s academic services, library services, student services, and academic integrity standards. The content of this web site is explicitly included as syllabus requirements.

The LTU Online “Current Students” web site also includes grading rubrics used by your instructor to evaluate written assignments, discussion forum participation, and group assignments. Please note that the SafeAssign anti-plagiarism product will be used for written assignments submitted for this course. Please see the instructions included on the LTU Online web site regarding the use of the SafeAssign product.

### **Leadership Transcripts**

The leadership transcript enables students to track co-curricular activities that are undertaken above and beyond the requirements of the LTU curriculum. The leadership transcript serves students by enhancing the leadership portfolio; providing the opportunity for a transcript of distinction; enhancing their resumes; and assisting in articulating leadership experience. It can be accessed by logging on to Banner Web and clicking the Student and Financial Aid tab. Leadership Activities is located at the bottom of the list.