### COURSE TITLE
MGT 6083 – Comprehensive Fund Development for Nonprofits Summer 2008

### BLACKBOARD SITE
MGT 6083 – Comprehensive Fund Development for Nonprofits Summer 2008 – [http://my.ltu.edu](http://my.ltu.edu) and select CRN 5315

### INSTRUCTOR
Mike Montgomery  
The Remington Group/Montgomery Consulting  
Contact Information  
mmontgomery@remingtongroup1.com  
Phone: 248-224-7330  
Office hours: Wed 9-11am and Thurs 7-9pm

### SCHEDULE
On-line modules and exam period (College of Management schedule):
May 14 – July 25, 2008  
See [http://www.ltu.edu/registrars_office/calendar_final_exam.index.asp](http://www.ltu.edu/registrars_office/calendar_final_exam.index.asp) for LTU academic calendar information.

### LEVEL / HOURS
Nonprofit Management Certificate, MBA / 3 semester credit hours

### REQUIRED TEXT
Principles & Techniques of Fund Raising ISBN#1-884354-05-x  
The Fund Raising School Center on Philanthropy of Indiana University (available only by contacting Rachel Conover at 248-204-2385 or rcrnonover@ltu.edu. Cost: $145)

### ADDENDA
LTU Online student resources [http://www.ltu.edu/ltuonline/currentonline.asp](http://www.ltu.edu/ltuonline/currentonline.asp)  
Course-specific information is provided in the “Course Information” area

### TECHNICAL SUPPORT
Technical support for using Blackboard is provided by the LTU Help Desk, 248-204-2330 or vitrc@ltu.edu
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.

This summer version of the course compresses 14-sessions into the 10-week summer format by combining sessions. 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.

Instructional Methods and Course Organization

Course Organization:

The course is structured as below:

- 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 deal with raising money from Foundations and *Fundraising Writing*.
- Modules 7 & 8 discuss raising money from Corporations and *Donor Recognition*.
- Modules 9 & 10 conclude the 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.

Instructional Methods:

- **Blackboard (Bb) 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, and telephone conference calls. You are required to call or email in Module -0 to discuss what you personally need/hope to learn from this course.
- **Required readings** – Textbook chapters should be read according to the schedule outlined in the syllabus. Text chapters and other readings are intended to support the lectures as well as enrich your written assignments and Bb Discussion participation.

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• **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:

• Each student has a LTU e-mail account. If you wish to use a different e-mail address for this course, please *change your e-mail address in Blackboard under “Student Tools”* and send an e-mail to me so I can store your address in my e-mail directory.
• Readings, discussion forum participation, and written assignments must be completed according to the class schedule. If business travel will take you away from regular participation, please clear these dates with me in advance.
• It is essential that all students actively contribute to the course objectives through their experiences and working knowledge of business and IT.
• All assignments must be submitted on schedule, via Blackboard, and using Microsoft Office-compatible software. If you need to submit an assignment via e-mail, contact the instructor in advance. Late work will be reduced in value.
• Assignments must be completed to an adequate standard to obtain a passing grade. Requirements for each assignment are detailed in this syllabus and on the LTU Online web site.
• Be prepared to log into Blackboard at least once each day. Please focus your on-line correspondence within the appropriate Blackboard discussion forums so that your colleagues can learn from you.
• 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, 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, and will include individualized comments and suggestions with each assignment.
• 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.

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Course Schedule

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

<table>
<thead>
<tr>
<th>Dates</th>
<th>Modules</th>
<th>Topics / Readings</th>
<th>Assignments Due</th>
</tr>
</thead>
</table>
| Prior to Start of Semester and Week of May 14 | Module 0 | **Online Learning & Course Orientation**  
Course Orientation  
The “Case” Method for assignments  
Overview of Course/Text  
Reading:  
Text: pages xi - xxiii | Instructor Conversation  
(Personal Learning Plan) |
| Week of May 19 - 25           | Module 1 | **A. The Nonprofit Community**  
**B. Fundraising**  
**C. Ethical Concerns in Fundraising.**  
**D. Language of Fundraising**  
Reading:  
Text: Section I, Chapters 1, 2, 3 and pages 45-55  
Bb - Discussion on ethics question.  
Written Description of “agency” student will use for assignments. |
| Week of May 26 – June 1       | 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  
Readings:  
Text: Section II, Chapter 4 & 5  
Text IV, Chapter 23  
Text: Section IV, Chapter 12  
Text: Section II, Chapter 5 | Bb Discussion on institutional readiness.  
Prepare “case points” outlining what a case statement for your agency might say in order to urge prospective donors to give. |
| Week of June 2 – June 8       | Module 3 | **Fundraising from Individual Donors and Introduction to Fundraising**  
a. Annual & Broad-based Giving (Direct Mail, Telephone, Internet)  
b. Intermediate Giving  
c. Prospect Research  
d. A healthy role for Events in Fundraising  
Reading:  
Text: Section IV, Chapter 13, 14, 15, & 16  
Text: Section IV, Chapter 17 & 18  
Text: Section VI, Chapter 25 (process) & 28 (resources)  
Chronicle of Philanthropy Article on Online Fundraising  
www.afpnet.org/ka/ka-3.cfm?content_item_id=6508&folder_id=1846 | Bb Discussion of appropriateness of different fundraising vehicles  
Draft a broad-based solicitation device (letter, telephone script, push email) |
<table>
<thead>
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<th>Topics / Readings</th>
<th>Assignments Due</th>
</tr>
</thead>
</table>
| Week of June 9 – June 15 | Module 4 | **Fundraising from Individual Donors and Introduction to Fundraising**  
  a. Major Giving  
b. Asking for Gifts  
c. Planned Giving  
Reading:  
Text Section VII, Chapter 29  
Text Section IV, Chapter 20 | Bb Discussion on how to integrate planned giving into a fundraising program.  
Prepare written plan for increasing giving by Individual Donors to your agency. |
| Week of June 16 – June 22 | Module 5 | **Fundraising from Foundations and Fundraising Writing**  
(and, by extension, from competitive government grant programs)  
b. How to research?  
c. Cultivating Foundations  
d. Solicitation  
Reading:  
MJM Monograph on Grant Writing  
Text Section VI, Chapters 25, 27 & 28 (review) | Bb Discussion on Foundations.  
Prepare a written Foundation Prospect Profile |
| Week of June 23 – June 29  | Module 6  | **Fundraising from Foundations and Fundraising Writing**  
(and, by extension, from competitive government grant programs)  
  a. Proposal Writing  
b. Ethical concerns in grant seeking/administration  
c. Stewardship & Reporting  
d. Renegotiation  
e. Surviving a failed grant/rebuilding trust  
MJM Monograph | Bb Discussion on ethical Grant Seeking.  
Prepare a simple / brief proposal to a foundation. – or -- Prepare fundraising plan for Foundations |
| Week of June 30 – July 6 | Module 7 | **Fundraising from Corporations and Donor Recognition**  
- a. Why do they give? Types of Support?  
- b. Critical Role of Recognition in Corporate Giving  
- c. Researching Corporate Prospects  

Reading:  
Text: Section IV, Chapter 26 & 28 (review)  
MJM Monograph on Grant Writing (review)  
http://www.gm.com/company/gmability/community/index.html |
|---|---|---|
| Week of July 7 – July 13 | Module 8 | **Fundraising from Corporations and Donor Recognition**  
- 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 http://www.sponsorship.com/ |
| Week of July 14 – July 20 | Module 9 | **A. Management of the Fundraising Process,**  
- a. Functions of the Development Office  
- b. Budgeting for Fundraising  
- c. Human Resources  

Reading:  
- a) Text  
  Section III, Chapters 7, 8, 9 (Management)  
  Section V, Chapters 22, 23, 24 (Human Resources)  
- b) Other  
  Chronicle of Philanthropy, Fundraising Frenzy & Coping with Fundraiser Shortage (right to use pending)  
  www.giving.umich.edu/careers/index.html |

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Week of July 21 - 27  | Module 10  | B. The Role of Campaigns in a Healthy Fundraising Program and Course Wrap-up  
| | | a. Role of Campaigns  
b. Wrap-up  
Readings:  
a) Text:  
Section IV, Chapter 19 (Campaigns)  
b) Other  
MJM “Countdown to Fundraising”  
David Owen, “State of the Art Panhandling,”  
Harper's Magazine.  
http://waynefirst.wayne.edu/

Student Evaluation

The course has five assignments totaling 100 points (left column). Letter grades are awarded based on the total number of points achieved (right column). Points are deducted for late assignments.

<table>
<thead>
<tr>
<th>Assignments</th>
<th>Points</th>
<th>Class Points</th>
<th>Letter Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan for Increasing Fundraising from Individuals</td>
<td>20%</td>
<td>96 and above</td>
<td>A</td>
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<tr>
<td></td>
<td></td>
<td>90 – 95</td>
<td>A-</td>
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<td></td>
<td></td>
<td>87 – 89</td>
<td>B+</td>
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<td></td>
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<td>83 – 86</td>
<td>B</td>
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<td></td>
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<td>80 – 82</td>
<td>B-</td>
</tr>
<tr>
<td></td>
<td></td>
<td>77 – 79</td>
<td>C+</td>
</tr>
<tr>
<td>Plan for Increasing Fundraising from Foundations or A Basic Proposal to a Foundation</td>
<td>20%</td>
<td>73 – 76</td>
<td>C</td>
</tr>
<tr>
<td>Plan for Increasing Fundraising from Corporations or A Corporate Gift or Sponsorship Proposal</td>
<td>20%</td>
<td>70 – 72</td>
<td>C-</td>
</tr>
<tr>
<td>The remaining 40% will come from weekly assignments some of which are short but formal others of which are less formal.</td>
<td>40%</td>
<td>61 – 70</td>
<td>D</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td>60 and below</td>
<td>E</td>
</tr>
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Note: Grades lower than “B” fall below the LTU graduate standard
Practical Guidelines for Class Load Expectations

A three-credit graduate 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:
1. A 14-week semester (the Summer “E” 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.
2. You should reserve at least 6 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 84 hours over the course of the semester.
3. 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:
   • 8-9 hours preparing your case study review;
   • 24-40 hours working with your group on the three parts of your semester-long project; and
   • 8-9 hours working on the various components of your reflective consolidation (final exam).

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:
Assignment Details

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.

**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 Proposal to a Foundation – 20%
- Plan for Increasing Fundraising from Corporations **or** A Corporate Gift or Sponsorship Proposal

The remaining 40% will come from weekly assignments some of which are short but formal others of which are less formal.

**Other assignments (30% of grade)**

- Description of the agency that will be the topic of 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%)

**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.

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

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 the assignments listed above.
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 to you to have sufficient access to that agency in order to do the assignments as though you are 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 feel strongly. Lecture materials and assignment details for Module O set some parameters for those who elect to “make up” their agencies.

Text

Through special arrangement, the text for this course will be Principles and Techniques of Fundraising that is produced by the Fundraising School which is a division of the Indiana University Center for Philanthropy.

As a result, this course will be directly equivalent in content to IU’s “Fundraising 101” for which the text, sometimes called “the red binder” was originally developed and continues to be used – including in an “on ground” version of this course taught at other times of the year here at LTU.

Because of our managerial focus, we will use much of the material in a different order than other courses using “the red binder.” I am thrilled, however, to be able to use this text that is normally not available to the general public because IU binder has become the standard tool used by people preparing for certification as professional fundraisers through examination as well what I believe is the single best “desk” reference on fundraising to have and use in your future career.

Syllabus Addenda

Please see the LTU Online “Current Students” web site http://www.ltu.edu/ltuonline/currentonline.asp for comprehensive information about Lawrence Tech’s academic services, library services, student services, and academic integrity standards. The contents 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 SafeAssignment 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 SafeAssignment product.