



Dillard College of Business Administration **MGMT 4633 - Nonprofit Fundraising & Grant Development**

Monday and Wednesday 9:30 am to 10:50 am, Dillard 338
Fall 2019 Semester Course Syllabus

Course Dates: August 24, 2019 thru December 14, 2019
Credit Hours: 3
Instructor: Sonia White, M.S.
Office: Dillard Building 215
Email: sonia.white@msutexas.edu
Phone: (940) 397-6996

Office Hours

Mondays and Wednesdays 8:00 am to 9:30 am; Mondays 2:00 pm to 3:30 pm; Tuesdays 8:00 am to 9:00 am; or by appointment. Office hours are designed for you, giving you a more private environment in which we may talk about your work, your performance in class, etc. If you are unable to see me during my office hours, do not hesitate to make an appointment to see me at a different time. I have an open door policy: if my office door is open and I am available, I am happy to visit with you.

Required Material

Lyskowski, L. ACFRE (2007). *Nonprofit Essentials: The Development Plan*. Hoboken, New Jersey: John Wiley & Sons, Inc. ISBN: 978-0470-11797-2 (paperback).
Additional readings and materials may be posted to D2L.

Check syllabus and bring this textbook to class on days in which you are assigned reading as you may have group activities in class which will require the textbook.

Recommended Material

Ciconte, B.L., Jacob, J.G. (2009). *Fundraising Basics A Complete Guide* (3rd Edition). Sudbury, Massachusetts: Jones and Bartlett Publishers. ISBN: 978-0-7637-4666-7 (paperback). There are several copies of this textbook in the Center for Nonprofit Management & Leadership Resource Library (DB 147). Please limit checking out 1 copy per group so that everyone has access to the book.

Turabian, K., revised by Booth, W., Colomb, G., Williams, J., Bizup, J., Fitzgerald, W. (2018). *A Manual for Writers of Research Papers, Theses, and Dissertations* (9th Edition). Chicago, IL:

University of Chicago Press. ISBN-13: 978-0-226-43057 (paperback). There are several copies of this reference book in the Center for Nonprofit Management & Leadership Resource Library (DB 147). Please limit checking out 1 copy per group so that everyone has access to the book.

Course Description

Introduction to the fundraising process, with a focus on the motivations and expectations of potential donors. Overview of how to locate potential sources of grant funding and how to develop a successful grant proposal.

General Learning Goals

1. Competency in speaking and writing for common business scenarios. Students will submit written assignments throughout the semester, as well as a final oral presentation to a local organization. Assessment will occur through grading of written assignments and in presentations throughout the semester.
2. Problem solving and decision-making abilities through critical analysis, evaluation, and interpretation of business information. Students will work in groups on a real marketing project. They will use real nonprofit information to develop a development plan for their client. Assessment will occur throughout the semester through regular group check-ins and peer evaluations.
3. Demonstrate how to be effective team members by using team building and collaboration to achieve group objectives. Students will work in groups and be assigned to work with a local nonprofit to develop fundraising and grant writing materials. Assessment will occur throughout the semester through regular group check-ins and peer evaluations.
4. Students will apply and demonstrate ethical reasoning skills within a business environment. Students will learn and apply best practices in real-life nonprofit business problem(s). Assessment will occur throughout the semester through regular group check-ins, peer evaluations, nonprofit evaluations and instructor evaluation.

These general learning goals are among those established by the Dillard College of Business Administration. General learning goals represent the skills that graduates will carry with them into their careers. While assessing student performance in obtaining these general learning goals, the Dillard College is assessing its programs. The assessments will assist us as we improve our curriculum and curriculum delivery.

Course Specific Learning Goals and Objectives

By the end of the course you will be able to:

- Identify and describe best practices of resource development and its relationship to capacity building and organizational sustainability;
- Analyze, evaluate and interpret development data and apply resource development theories and processes to a “real-world” nonprofit scenario/situation;
- Create a case statement for a local nonprofit which can be used to develop fundraising collateral materials such as grant proposals, brochures, etc.;

- Conduct a Development Audit, and from the audit make development recommendations and create a development/fundraising plan for a local nonprofit;
- Create a grant prospect list for a local nonprofit;
- Presentation to nonprofit;

The purpose of this course is to train students to understand the trends and practices that guide successful and ethical fundraising. Students will learn to develop comprehensive fundraising plans and how to write compelling case statements. All students will partner with a nonprofit organizations for the duration of the course. They will apply information and concepts learned in this course to help their nonprofit partners improve their fund development operations. The course will build on concepts and create several key deliverables for the nonprofit: a Development/Fundraising Plan; a case statement; and a presentation to the nonprofit.

Class Communication

I will provide course updates, readings, handouts, and other communication in class and/or on D2L. Students may also check their grades via D2L. Students will need to set up their notifications in D2L so they are notified about communication and/or assignments posted on D2L. If you have any questions or need any help, the best way to reach me is via e-mail. Always include in the email your **first and last name** as well as the **name of the course (Fundraising; Grant writing, MGMT 4633, etc.)** you're emailing me about.

Assignment Submissions

Most written assignments will be submitted through D2L. Please only submit typed **Word** documents unless otherwise specified. If you use Pages (or another word processor), **please convert your document to Word before submitting**. Submissions by email will generally not be accepted. However, should there be a circumstance where you need to submit an assignment via email (e.g. the system is down), all emails of class files that are sent to me need to be saved. This will help you in the rare case that an email is lost, as the date on the original sent email can be referred to. There will be absolutely no exceptions in the case of emails lost if you cannot produce the original sent email. But please make a rule of submitting assignments through D2L.

Course Grading and Evaluation

Activities	Percentage	Possible Points
Participation and Attendance – up to 5 points per class for full attendance and full participation; absence results in 0 pts; tardiness, leaving early, being disruptive and/or non-participatory results in 3 pts or less.	10%	150
Group peer evaluations: 50 pts each 3x per semester.	10%	150
Professionalism with “clients” Professional attire; professional verbal and written communication; overall professional demeanor (on time; preparedness; quality of work) based on evaluation/assessment from nonprofit representatives	10%	150
Quizzes: 50 points each 3X per semester. Quizzes will cover reading assignments as well as material from guest speakers and instructor lectures. Quizzes are unannounced. Participation in <i>Together We Make a Difference Community Service Day</i> can substitute for one quiz.	10%	150
Completed Development Audit w/corresponding research documents	15%	225
Development/Fundraising Plan Includes Development audit findings and recommendations	15%	225
Case Statement Includes grant prospect list	15%	225
Group Presentation (FINAL) with notebook	15%	225

Participation and Attendance (Individual evaluation 10%):

Attendance and Participation will be heavily weighted in this class and be worth 10% of grade. **Attendance and Participation** could also negatively impact other grades such as peer evaluations and professionalism. You cannot be successful in this class if you do not attend class regularly; if you come to class late and/or leave class early; or do not participate in small groups, discussion or activities. In particular, students will be assessed for their preparation for class and engagement in discussions and activities (group work; group assignments). You will be assigned to groups at the beginning of the semester and will remain with the same group throughout the semester. Each group will be assigned a local nonprofit to work with. Significant class time will be given to complete and work on group assignments, therefore regularly attendance, promptness and class participation is a must.

- Attendance, being well prepared and full engagement in group/class activities will earn up to 5 pts per each class;
- Tardiness; leaving class early; being unprepared and/or poor contribution to group/class will earn 3 pts OR LESS.
- Absent and/or disruptive or non-contribution to group/class will earn 0 points.

Also see **attendance** under **Course Policies**.

Peer Evaluations (Individual evaluation 10%)

Peer Evaluations will be used to evaluate the contribution of INDIVIDUALS to the group and will be worth approximately 10% of your grade. Your ability to contribute as a productive team member is important to your success in this class. You will evaluate your team members and yourself; and they will evaluate themselves and you. **Peer Evaluations** will be submitted in D2L so that students can provide honest and objective feedback. I expect honest and objective feedback based on concrete evidence and specific examples.

Any ratings above or below an average rating (3) will require an example of WHY the rating was above or below average. For example, if you give a team mate a 5 for contribution to the group, you should provide an explanation in the comment section, such as, *“Evan provided outstanding contribution because he interviewed the ED of our nonprofit on two different occasions and provided most of the input for our Development Plan Evaluation.”* If you rated a team mate with a below average rating, such as a 2 for contributing to the group, I would expect an explanation in the comment section, such as, *“Leo did not contribute to our group, because he was often absent and/or tardy to class, and did not complete tasks for the group on time.”*

My goal for the peer and performance evaluations is to make a stronger connection between team member performance and contribution and their grade. **Peer Evaluations** should also reflect improved, consistent performance, or, lack of effort and/or inconsistent performance OVER TIME. A team member who shows improved performance over time and exhibits the ability to take and apply constructive criticism should get a good and/or improved grade over time for the peer evaluations. A team member with so-so performance that makes no apparent effort to improve their performance or apply constructive criticism should not do as well OVER TIME.

Professionalism (individual evaluation 10%)

As a student in this class, part of the requirement is to work closely with a local nonprofit in a pseudo-professional context and you will also have opportunities to interact with professionals from the nonprofit sector who will visit the classroom as guest lecturers. It is expected that ALL your interactions with the nonprofit professionals be conducted in a professional manner. Please be mindful that your written communication, such as email, should include proper salutations (Mr., Ms., Dr., etc.), should follow proper spelling and punctuation guidelines, and convey an overall professional and business-like demeanor. Do NOT write your emails like text messages: do NOT use emoji’s, do NOT use abbreviated spellings of words such as “u” for you; “2” for to, etc., or acronyms like LOL, LMAO, etc. Call or email your contacts, do not

text! When you meet with your nonprofit representatives in person, please dress appropriately. I do not expect you to dress in a business suit, however, I do expect you to dress appropriately and conservatively. This would mean that the following would NOT be appropriate: sweats, shorts, tank tops, torn/ripped clothing, flip flops. Always introduce yourself and provide your contact info with the best way to reach you. Treat these opportunities as a way for you to practice your business professionalism. The nonprofits will be given an opportunity to assess and evaluate each student's professionalism throughout the semester and I will observe and evaluate your interaction with guest speakers.

Quizzes (individual evaluation 10%)

Quizzes will be used to evaluate individual understanding of key concepts, principles and best practices discussed in lectures, covered in assigned text readings and applied through group assignments and will be worth 10% of your total grade for the class. **Quizzes** may or may not be announced ahead of time. **Quizzes** will be made up of a combination of multiple choice, true/false and short essay questions. Each quiz will cover KEY principles which have been discussed in class and/or applied through your group projects. If you attend class, participate in class discussion and contribute to group projects you should do well on quizzes; if you do not attend class, do not participate in class discussion and do not contribute to group projects you will probably NOT do well on the quizzes. If student registers and participates in *Together We Make a Difference Community Service Day*, they may substitute 50 pts for a quiz grade and/or replace a low quiz grade.

Development Audit (group evaluation 15%)

The **Development Audit** will be used to evaluate your GROUP's understanding of key concepts, principles and best practices discussed in lectures, covered in assigned text readings and applied through group assignments and will be worth 15% of your total grade for the class. In order to complete the Development/Fundraising Plan you will have to complete the development program audit/evaluation with your nonprofit. This audit/evaluation assignment is a tool to help your group: identify areas in which you may be able to make recommendations for improvement; highlight areas in which the nonprofit are having success; and assist with writing the Development/Fundraising Plan. The instructor will provide a template/guidelines for completing this assignment.

Development/Fundraising Plan (group evaluation 15%)

The **Development/Fundraising Plan** will be used to evaluate your GROUP'S application of critical thinking skills and understanding of key concepts, principles and best practices discussed in lectures, covered in assigned text readings and applied through group assignments and will be worth 15% of your total grade for the class. The **Development/Fundraising Plan** will require that you completing a development program audit/evaluation with your nonprofit. The assignment should incorporate findings from the Development Program Audit and will outline goals, timelines and provide an appendix with resources, templates, samples, etc. The **Development/Fundraising Plan** is a tool to help the nonprofit in growing and/or diversifying its fundraising efforts. The **Development/Fundraising Plan** should also be designed in a way in which it has realistic goals and a plan for reaching the goals. The plan created by the group should reflect critical thinking and demonstrate basic

understanding of key fundraising and development best practices, principles and ethics. The instructor will provide a template/guidelines to be used for Development Plan.

Case Statement (group evaluation 15%)

This assignment will be used to evaluate your GROUP'S understanding of key concepts, principles and best practices discussed in lectures, covered in assigned text readings and applied through group assignments and will be worth 15% of your total grade for the class. The **Case Statement** should be a foundational document which will inform and guide the overall fundraising of the entire organization. Many times organizations develop new Case Statements when they are planning to launch a new or redesign their existing fundraising approach. The **Case Statement** should cover the basic elements of a well-written case statement. The document will also need to include in the appendix a **Grant Prospect List** which is a list of at least 10 potential funders which the organization could develop grant proposals using their case statement. The grant funders on the list should have funding priorities which are in line with the organization's mission, vision and specific funding needs. The list should be vetted and only include funders which fund nonprofits in our geographic region and which your selected nonprofit meets all their criteria. Your grant prospect list should include their typical funding cycles, and include basic information. Instructor will provide a template and instructions.

Group Class Presentation (counts as final; 15% of grade)

At the end of the semester, each group will work together to create a presentation which will be presented to the class and to representatives from your nonprofit organization. The presentation will include a visual, informative, professional presentation based on the content of the Case Statement and in alignment with your recommendations of your Development Plan. The nonprofit should get 3 hard-copies, as well as electronic copies, of the Presentation, Development/Fundraising plan, and the Case Statement with a grant prospect list. Instructor will provide 3-ring binders, dividers and a flash drive for each group.

Extra Credit

Together We Make a Difference Community Service Day, October 26, 2019, will provide an opportunity to participate in a community service project with local nonprofits and local youth from area schools. If you participate in this half-day event, you can earn 50 pts to substitute one of your Quiz grades. In order to earn the 50 pts, you must register in advance with The Center for Nonprofit Leadership and Management, you must arrive on-time and stay the entire time of your commitment.

There may be other extra credit opportunity in this course. You will be informed if an opportunity becomes available.

Course Policies

Grades

Grades will be entered into the gradebook on D2L. It is the student's responsibility to keep all graded materials that have been returned by the instructor for the entire semester. Technical

glitches happen, you will need to hold on to your final copy of any assignment in the event that a file does get lost. **Any request to change a grade must be made to the instructor via email within one week of when the grade was posted to D2L.**

Attendance

Attendance is absolutely crucial for your success in this class. I will take attendance at the start of each class meeting. Attendance and participation will be heavily weighted in this class and be worth 10% of grade. Attendance and participation could also negatively impact other grades such as peer evaluations and professionalism. You cannot be successful in this class if you do not attend class regularly, if you come to class late and/or leave class early, or do not participate. In particular, students will be assessed for their preparation for class and engagement in discussions and activities (group work; group assignments). As the instructor, I also may exercise my right to drop you from the class if you have more than 3 unauthorized and/or invalidated/undocumented absences. This would result in you receiving an “F” for the class.

Absences due to required participation in university sponsored activities are considered “authorized absences”. Students with written approval for an “authorized absence” must present a signed letter or memo to the instructor PRIOR to the date of the absence. Only prior notification can guarantee lack of penalty for these absences. It is the responsibility of the student to make arrangements with the instructor to make up missed work during the authorized absence.

“Valid, documented” absences fall in the following categories: medical, legal, or serious personal issue beyond your control (e.g. relative’s death or serious illness; jury duty; car accident) and in order for these absences to be considered “valid and documented” the student must provide documentation such as a written doctor’s excuse, jury summons, police report, etc. Further validation may be required by the Student’s Right and Responsibilities Office. Not feeling well, oversleeping, studying for a test, or having another project due, does NOT meet the criteria for a valid absence.

Late Work

No late assignments or presentations will be accepted. Quizzes can be made up only in the case of authorized absences or valid, documented excuses (see above). Deadlines are very critical in this class due to the real-time, real-world project environment. Not meeting deadlines, being late to class, being late to appointments with your nonprofit is unacceptable.

Professionalism

As a student in this class, part of the requirement is to work closely with a local nonprofit in a pseudo-professional context. It is expected that ALL your interactions with the nonprofit and myself be conducted in a professional manner. Please be mindful that your written communication to me and/or your nonprofit representatives, such as email, should include proper salutations (Mr., Ms., Dr., etc.), should follow proper spelling and punctuation guidelines, and convey an overall professional and business-like demeanor. When you send any email correspondence to your nonprofit representative(s) you MUST copy me on the correspondence. Do NOT write your emails like you write your text messages: do NOT use

emoji's, do NOT use abbreviated spellings of words such as "u" for you; "2" for to, etc., or acronyms like LOL, LMAO, etc. Call or email your contacts, do not text!

When you meet with your nonprofit representatives in person, please dress appropriately. I do not expect you to dress in a business suit for a meeting with your nonprofit, however, I do expect you to dress appropriately and conservatively. This would mean that the following would NOT be appropriate: sweats, shorts, tank tops, torn/ripped clothing, flip flops. Always introduce yourself and provide your contact with the best way to reach you. Treat these opportunities as a way for you to practice your business professionalism. The nonprofits will be given an opportunity to assess their experience with MSU Texas, the class and the students.

When you make your presentation to your nonprofit at the end of the course it is expected that the students will dress in business professional, which means a conservative business suit. If you need assistance with business professional clothing, MSU has a clothes closet to assist you with business professional clothing. It is located at the Clark Student Center.

Midterm Progress Reports

In order to help students keep track of their progress toward course objectives and to be successful in this class, the instructor will provide Midterm Progress Reports (5-8 weeks after the start of the semester) for all students through each student's WebWorld account. Midterm grades will not be reported on the students' transcript; nor will they be calculated in the cumulative GPA. The midterm grades are simply an indicator of where the student stands at the midpoint of the semester based on performance, attendance and participation up to that point. It is highly recommended that students earning at or below a C at the midway point should schedule an appointment with the instructor to discuss how to improve student outcome.

University Policies

Academic Integrity

Refer to the "Student Honor Creed" in the undergraduate catalog. If I discover that a student has engaged in academic dishonesty (cheating, collusion, and/or plagiarism) on any work for this course, they will receive an F (0 points) for that work. Repeated instances will result in failing the course. All instances of academic dishonesty will be reported to the Dean of Students.

Syllabus Change Policy

This syllabus is a guide for the course and is subject to change. Syllabus changes will be communicated via D2L and/or in class.

Grade Appeals

Any student who believes a final grade has been inequitably awarded should first contact the instructor who awarded the grade to discuss the issue and attempt to resolve the differences. A student has 30 days following the first day of the succeeding semester to file a written appeal with the dean of the instructor's college in which the course was taught. Refer to the

Undergraduate Catalogue for further details. See the MSU Student Handbook for University policy on grade appeal.

Americans with Disabilities Act

If a student has an established disability as defined by the Americans with Disabilities Act and would like to request accommodation, that student should please contact me as soon as possible. Any student requesting accommodations should first contact Disability Support Services at 940-397-4140 in room 168 Clark Student Center to document and coordinate reasonable accommodations if you have not already done so.

Concealed Carry

Senate Bill 11 passed by the 84th Texas Legislature allows licensed handgun holders to carry concealed handguns on campus, effective August 1, 2016. Areas excluded from concealed carry are appropriately marked, in accordance with state law. For more information regarding campus carry, please refer to the University's webpage on [Campus Carry Rules and Policies](#).

Important Deadlines and Dates

Change of Schedule or Late Registration: August 26-28, 2019

Deadline for December graduates to file for graduation: September 30, 2019

Deadline for May graduates to file for graduation: October 7, 2019

Last day for "W" from classes (drops AFTER this date will receive an "F"): October 28, 2019

Commencement: December 14, 2019

Class Assignments and Due Dates

Date	Central Topic of Class	Reading/Handouts	Assignment Due
8/24	Welcome; Introduction to class and class expectations;	Class syllabus; student information sheet; photo/video release	Complete student information sheet; Sign photo release form
8/26	Guest guests: The Kitchen; WF Youth Symphony Orchestra; Wichita Adult Literacy Council; Arts Council of Wichita Falls; Faith Mission	MOU; examples of deliverables: audit report; case statement; fundraising plan	MOU due at end of class; Students will be assigned and meet with nonprofit;
9/2	No class – LABOR DAY HOLIDAY		
9/4	Guest Speaker: Leslie Shaffner, CEO Wichita Falls Area Community Foundation Fundraising using Social Media	Chapters 1 – 3, Lysakowski <i>Optional:</i> Chapter 2, Ciconte & Jacob	Have at least one appointment scheduled to meet with nonprofit staff
9/9	Lecture: Elements of a Healthy Fundraising Program	Handout: Bring copies of Development Audit tool to class	
9/11	Guest Speaker: MSU Development office: Donor Database and developing a fundraising plan	Review Chapters 1 – 3, Lysakowski; Read Chapter 4 & 5 <i>Optional:</i> Chapter 4, 5, Ciconte & Jacob	

Date	Central Topic of Class	Reading/Handouts	Assignment Due
9/16	Lecture: Introduction to Philanthropy and Fundraising Ethics	Handouts: Donor Bill of Rights; AFP Code of Ethical Principles; Standards for Excellence <i>Optional:</i> Chapter 1, Ciconte & Jacob	
9/18	Lecture: What is a Case for Support? And why should a nonprofit have one?	Handout: How to Write a Case for Support Handout: Case for Support template and guidelines	Development Audit Worksheet DUE 9/18 at beginning of class must include RESEARCH (notes of interviews, brochures, copy of strategic plans; etc.) Peer Evaluation Due D2L
9/23	Guest Speakers: Gary Kirkendahl, CEO Living Hope International; Karen Yarbrough, Director of Donor Relations, Allies in Youth Development Individual Donors, Major gifts; Annual Giving	Optional: Chapters 6, 7, 8 Ciconte & Jacob	
9/25	Lecture: What should a case statement include? Field Trip: Center for Nonprofit DB 147	Handouts: Habitat for Humanity Case Statement and other case for support examples Optional: Chapter 13, p. 321, Ciconte & Jacob	
9/30	Lecture-Stating the Need: Using relevant statistics in writing: using secondary and primary data sources		Worksheet/Group Discussion
10/2	Lecture-Pulling at the heartstrings: Using real-world stories in your writing: Use real clients to tell story; ethics of protecting clients		Worksheet/Group Discussion
10/7	Lecture-Showing impact: Why what you do matters! Logic Models, Goals and Strategies	Handouts: Logic models; SMART goals; evaluation tools	Worksheet/Group Discussion
10/9	Lecture-Finances and talking about money: how to create a budget	Handouts: Budget worksheets, financial statements	Worksheet/Group Discussion
10/14	Work in Groups - Case Statement		Working groups

Date	Central Topic of Class	Reading/Handouts	Assignment Due
10/16	Lecture: Types of Fundraising: Foundation and Government grants	Handouts: Sample grant proposal Optional: Chapter 11 and 16, Ciconte & Jacob	Case Statement w/Grant Prospect list due D2L 10/16 Peer Evaluation Due D2L
10/21	Lecture: Types of Fundraising: Annual Giving and Major Giving Campaigns	Chapters 4 & 5, Lysakowski Optional: Chapter 6, 9, Ciconte & Jacob	
10/23	Lecture: Types of Fundraising, Special Events	Optional: Chapter 12 Ciconte & Jacob	
10/26	Together We Make A Difference Community Service Day	Must register in advance with Center of Nonprofit Management & Leadership	
10/28	Guest Speaker: Aaron Alejandro, Texas FFA Foundation, Corporate Sponsorships	Optional: Chapter 10, Ciconte & Jacob	
10/30	Lecture: Donor-Centric Fundraising: Making your appeal	Chapters 6 & 8, Lysakowski Optional:	Worksheet/Group Discussion
11/4	Lecture: Types of Fundraising: Capital Campaigns and Endowments	Optional: Chapter 14, Ciconte & Jacob	Worksheet/Group Discussion
11/6	Lecture: Types of Fundraising: Planned Giving	Optional: Chapter 15, Ciconte & Jacob	Worksheet/Group Discussion
11/11	Work in groups – Fundraising Plans and Recommendations		Working groups
11/13	Lecture: Appeal Presentation Template for presentations; work in groups on presentations		Fundraising Plan/ Recommendations Due 11/13 in D2L Peer Evaluation Due D2L Nonprofit Evaluation
11/18	Work in groups on presentation		Working groups
11/20	Practice run-thru on presentations		
11/25	Practice run-thru on presentations		
11/27	No class – Thanksgiving break		
12/2	Class Presentations: Representatives from nonprofits will be in attendance; representatives from DCOBA faculty will be in attendance		Fundraising Presentation due; Complete Notebooks for Nonprofit due Peer Evaluation Due D2L
12/4	Class Presentations		
12/9	Class Presentations (if needed)		

