

Fundraising and External Relations for Nonprofit Organizations

UST 451-750/751

Fall 2023

**Maxine Goodman Levin School of Urban Affairs
Levin College of Public Affairs and Education
Cleveland State University**

UST 451-750/751

3 credit hours

Updated: 7/12/2023

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Office: Urban Building, Room 221, 1717 Euclid Avenue Cleveland, OH 44115

Office Hours: By Appointment Online, or by Phone

Course Location: REMOTE via Zoom & Blackboard

Meeting Time: Monday 6:00 – 8:50 PM

Course Numbers: 5519 (Section 750) & 2969 (Section 751)

Sections: 750 & 751

Course Description:

This course provides the fundamentals of fundraising and external relations for nonprofit organizations, with special emphasis on the challenges faced by small to mid-sized community and faith-based organizations; development of viable strategies for attracting diverse and sustained financial support for nonprofits; development of strategies for dealing with clients, area residents, members, trustees, legislators, the press, and other important constituents; practical, hands-on exploration of the skills and knowledge needed to equip managers of nonprofits to position their organizations effectively in the community.

Required Texts:

- Michael Seltzer, *Securing Your Organization's Future: A Complete Guide to Fundraising Strategies*. Revised and Expanded Edition, (New York: The Foundation Center, 2001). ISBN 0-87954-900-9 paperback. There is a copy on reserve at the CSU Library:
https://researchguides.csuohio.edu/er.php?course_id=90805#
- Reis, Jeremy. (2021) *The Post-Pandemic Nonprofit: 12 Disruptive Trends Your Nonprofit Must Master*, New York: Nonprofit Donor Press. ISBN-13 978-0-9760043-6-3 paperback

Course Objectives:

The purpose of the course is to provide students with academic and practical skills. Upon completion of this course, students will gain a better understanding of:

1. Raising funds in support of nonprofit organizations
2. The basic sources of funds and the elements of ongoing fundraising campaigns
3. Key elements of external and media relations

Course Method:

The class is a seminar course that requires student participation through assigned readings, class exercises, case study analysis, and discussion. Students are expected to complete the required reading, (including any handouts, or other assignments in addition to the specified text), attend all class sessions, participate in group discussions, and contribute to the learning experience. Students who must miss a class should notify the instructor prior to the start of class. Students who miss more than one class, without proper documentation, will have their final grade reduced accordingly.

Grading:

Your grade is based upon regular, frequent class participation, the quality of your work on the required assignments, and your performance on the final exam. Students are expected to attend all classes and to complete all homework assignments. Assignments are due as indicated. **Late assignments, based on emergency situations only, will be accepted with prior approval from the instructor, and may lose 2 points for each day the assignment is late.**

Class Participation	20 points
Assignment 1	5 points
Assignment 2	5 points
Assignment 3	10 points
Assignment 4	10 points
Development Staff	
Interview Paper	20 points
Final Exam	30 points
Total	100 points

A = 94 - 100

A- = 90 - 93

B+ = 87 - 89

B = 83 - 86

B- = 80 - 82

C+ = 77 - 79

C = 70 - 76

D = 60 - 69

F = 59 and below

University Policy Statements:*University Deadlines*

- For the current semester, the deadline for dropping a course is September 8, 2023
- The last day to withdraw from the course is November 3, 2023
- The final examination week is December 11-16, 2023

Grades of "I" and "X"

- X - For undergraduate courses the grade of "X" can only be administratively assigned by the Office of the University Registrar to indicate a grade has not been assigned by an instructor. For undergraduate students who have stopped attending/participating without notification and have not completed all assignments for reasons that cannot be determined, instructors should assign the earned grade. Any grade of "X" will become a grade of "F" at 11:59 PM the day following the grading deadline.

- I - Incomplete. The "I" grade is given when the work in a course has been generally passing, but when some specifically required task has not been completed through no fault of the student.
- An "I" grade can be assigned by the instructor when all three of the following conditions are met:
 1. Student is regularly attending/participating in the class and has the potential to pass the course;
 2. Student has not completed all assignments and has stopped attending/participating for reasons deemed justified by the instructor; and
 3. Student has notified the instructor prior to the end of the grading period.

Students with Special Needs

Educational access is the provision of classroom accommodations, auxiliary aids and services to ensure equal educational opportunities for all students regardless of their disability. Any student who feels he or she may need an accommodation based on the impact of a disability should contact the Office of Disability Services at (216) 687-2015. The Office is located in MC 147. Accommodations need to be requested in advance and will not be granted retroactively. Students should notify the instructor as soon as possible if they have been granted an accommodation through the Office of Disability Services.

OIE Statement

Federal law, including Title IX, and University policy require that CSU address discrimination, harassment and sexual violence and enable students affected by these issues to have the same opportunity to succeed as other students. To do this, the CSU Office for Institutional Equity (OIE) provides information, identifies resources (counseling, medical, advocacy, safety planning), issues academic accommodations (excused absences, extended deadlines, late withdrawals, alternative assignments) and other accommodations (No Contact Directives, changing living arrangements). Any student affected by discrimination, harassment and/ or sexual violence and seeking assistance, should contact the Office for Institutional Equity by calling 216-687-2223, sending an email to r.lutner@csuohio.edu or m.vogelgesang@csuohio.edu, or visiting AC 236.

Writing Assistance

Students with difficulty writing may contact the Writing Center located in Rhodes Tower 124 for assistance. <https://www.csuohio.edu/writing-center/writing-center> Students should use the American Psychological Association (APA) format for citations and reference pages.

Plagiarism

Plagiarism is stealing and/or using the ideas or writings of another in a paper or report and claiming them as one's own. This includes but is not limited to the use, by paraphrase or direct quotation, of the work of another person without full and clear acknowledgment. The penalties for plagiarism are found in full in the Student Handbook (Office of Student Life) under Academic Regulations (Policy on Academic Misconduct) at the following link:

<https://www.csuohio.edu/sites/default/files/StudentCodeOfConduct.pdf>.

COVID Safety Protocols

The COVID-19 pandemic is still present and serious. Vaccination plus booster shots offers the absolute best protection against serious illness, hospitalization, or death from COVID-19. CSU Health and Wellness Services continues to provide free vaccinations and booster shots for students, faculty, and staff by appointment in Room 205 at the Center for Innovation in Medical Professions (2112 Euclid Avenue). Call 216-687-3649 to schedule. If you test positive for COVID-19, isolate, and follow CDC guidelines. Also, please email our CARE team and let your course instructors know. For additional information, see *CSU COVID-19 Information and Protocols*: <https://www.csuohio.edu/safe-campus/covid-19-information-0>

Assignments:

Short Papers

There are four written assignments of **three to five pages** each, written in APA style with 12-point font and normal margins. All papers are **due at 6:00 pm on the specified date** and should be uploaded to the Blackboard site for grading. Papers must include a **title page** with the student's name, email address, course name/number/section, paper #, and the date the assignment is due. Papers are to be based on a single **nonprofit organization chosen by the student**. This same organization will also be used for the Development Staff Interview assignment. (Please note that **The United Way, foundations, hospitals, colleges & universities, congregations, and organizations that have not yet received their 501 (c) (3) status, cannot be used** for these assignments).

Paper # 1 Due Week 4 (**Mon 9/18**): Describe your nonprofit's **key sources of revenue**. Determine and indicate what percentage of the organization's total support they represent and identify the largest contributors for each of the sources. Make certain that you discuss all forms of revenue, including any income that is derived by means other than fundraising.

Paper # 2 Due Week 6 (**Mon 10/02**): Prepare a **fundraising letter** for your organization that is personal, passionate, clearly describes why funds are needed, and tells the reader how their gift can help to meet those needs.

Paper # 3 Due Week 9 (**Mon 10/23**): Identify the **other nonprofits in the community** that are doing work that is similar to your organization's focus (serving youth, addressing hunger, etc.) and conduct **research to find out who funds those organizations**; when possible, determine specific dollar amounts. Based on this review, **develop ten (10) prospects for your organization**, and identify a suggested gift amount for each. Be sure to provide a description of the rationale that you used to select each prospect, and how you arrived at the size of their potential gift.

Paper # 4 Due Week 11 (**Mon 11/06**): After reading the W.K. Kellogg Foundation Report: *"Cultures of Giving: Energizing and Expanding Philanthropy by and for Communities of Color – Executive Summary January 2012"* (17 pages; available on Blackboard), describe two, or three, ideas that most resonated with you, and discuss how you might apply those ideas to enhance your organization's overall fundraising strategy.

Development Staff Interview Paper

Prepare an overview of a personal interview with one of the professional development staff at your organization. You can interview any level of staff person if they have personal fundraising responsibility and experience. (Note that the first three questions can be answered based on a review of the organization's website and materials, so your interview focus should be questions # 4-9). The paper should be **five to ten pages** with 12-point font and normal margins and written using APA format.

The Development Staff Interview **papers are due Week 14 (Monday 11/27)**. Each student should also be prepared to discuss their interviewee's answers to questions # 5-9 during a **group exercise in class**. We will then share the highlights of these small group discussions with the entire class. Please note that this exercise is an important part of your final grade and there is a **three-point penalty for non-participation**.

Your inquiry should include the following:

1. The organization name, address, and the names & titles of the Chief Executive and Board Chair
2. The Mission Statement, and if applicable, any formal Vision or Values Statement
3. The organization's primary or core program offerings and the total public support budget amount

4. Other than the individual being interviewed, who else (including staff and volunteers) are directly involved in fundraising, and what are their titles and roles?
5. Is the annual fund/direct mail program handled internally, or externally? How often, and to how many people do they mail? Who develops/writes the fundraising letter and materials? (If possible, obtain a sample fundraising letter).
6. How important are special events to the organization and what are the pros and cons of this activity?
7. What aspect of their fundraising program are they most excited about? What could they do to make that even better and more exciting?
8. What recent large gift or grant are they most proud of? How did they secure it?
9. Which of their programs & services do they think are most meaningful to the community?
10. What impressed, or moved, you (the student) most about what you learned from this exercise?

Development Staff Interview Paper Grading:

- 1 point each for questions # 1 & 2 = (2)
- 2 points each for questions # 3-10 = (16)
- 2 points for participation in discussion = (2)
- Total Possible Points = (20)
- You can also lose up to 3 points (15%) for grammar, syntax, proofreading, etc.

Final Exam:

There will be a final exam that will test the knowledge of students based on the reading assignments, handouts, and material covered in class. Questions will include multiple choice, fill in the blank, true, or false, and short essay. **The Exam will take place online, via Blackboard, on Monday December 11th from 6:00 to 8:00 PM. The exam will open at 6:00 pm and close at 8:00 pm.**

Class Schedule/Due Dates/Assignments:

Week 1:	8/28	Introductions; Familiarity with Fundraising; Review Syllabus and Assignments. History & Requirements of Nonprofit Status (Seltzer: Chapters 1 & 2)
Week 2:	09/04	Labor Day NO CLASS
Week 3:	09/11	Fundraising Overview (Seltzer: Chapter 6)
Week 4:	09/18	The Role of the Board (Seltzer: Chapter 3 & Reis: pp. 7-31) Paper # 1 Due
Week 5:	09/25	Annual Fund; Special Events; Fundraising Online (Seltzer: Chapters 7-10 & Reis: pp. 113-156)
Week 6:	10/02	Corporations and Businesses (Seltzer: Chapter 16) Paper # 2 Due
Week 7:	10/09	Private and Community Foundation Support (Seltzer: Chapter 15)
Week 8:	10/16	Professional Guest Presentation and Discussion. (Read guest bio, visit website, prepare thoughtful questions)
Week 9:	10/23	Major Donors & Planned Giving (Seltzer: Chapters 11, 12) + Fearless Fundraising: "Strategies During COVID-19" Paper # 3 Due
Week 10:	10/30	Organizations, Institutions & Federated Fundraising (Seltzer: Chapters 18-21)
Week 11:	11/06	Government Funding; Identity-Based Philanthropy (Seltzer: Chapter 17) Paper # 4 Due
Week 12:	11/13	External Relations; Donor Recognition; Media Management + Survive & Thrive (Reis: pp. 47-56 & 85-97)
Week 13:	11/20	Professional Guest Presentation and Discussion. (Read guest bio, visit website, prepare thoughtful questions)

Note: Thanksgiving Recess is November 23-24

Week 14:	11/27	Group Exercise: Sharing "Interview" highlights with a focus on questions # 5-9 Development Staff Interview Paper Due
Week 15	12/04	Course Review; Additional Q & A
Week 16	12/11	The Final Exam will take place online, via Blackboard, on Monday, December 11th. The exam will <u>open at 6:00 pm and close at 8:00 pm.</u>

Candid (Formerly the Foundation Center):

Among many services, Candid offers *The Foundation Directory Online*, which is an invaluable tool for fundraisers. This robust paid subscription service is available free via several public libraries in the Greater Cleveland Area (see handout). **Students are strongly encouraged** to access the directory to gain some experience conducting online research using this comprehensive tool.

Additional Reading:

In addition to the text assignments indicated above, there are multiple handouts for this course that are available on Blackboard. They are typically posted in subject matter order and generally follow the Syllabus. There may be occasional additions throughout the semester.

Questions and Correspondence:

If you need to contact me for clarification, a question about a specific assignment, a personal matter, etc., please **do not use the Blackboard messaging system** for that purpose. Instead, send an email directly to j.m.bowen@csuohio.edu, and I will get back to you as quickly as possible. Also, your professors genuinely appreciate it when you put the **Course and Section numbers along with the reason for the note in the subject heading** of your correspondence. It may also expedite their response.

Screens & Phones in the Classroom:

The use of laptops, tablets, and other devices is prohibited during traditional "Face-to Face" classes that meet on campus and highly discouraged during Zoom classes. Recent research at Princeton, UCLA and several Canadian Universities has found that laptops significantly distract from learning for both the users and the people around them, and that students tend to learn less and get lower grades. Also, please **silence your cell phones before class, and do not use them**, except during breaks. Parents, caregivers, first responders and others who need to respond to an ***emergency call, or text message***, are welcome to do so, but please leave the classroom. In the case of classes meeting via Zoom, please silence your microphone and pause your video feed if you need to take an emergency call.

Please Note:

While every effort has been made to provide a comprehensive overview of the course content, assignments and due dates, the instructor reserves the right to add assignments, or make other changes to the syllabus, as the semester progresses.