# Syllabus | Fundraising and Development – 1017 – MGMT 6002 – A

Milano The New School for Management 6 East 16th Street, Room TBD, Mondays at 6:00pm

Instructor: Kevin Allan (Managing Director, Changing Our World)

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Office hours by appointment.

#### **Course Description**

Most US-based nonprofits receive revenue from a diverse base of public, private, and market sources, including some \$300 billion in philanthropy. Organizational size, history, prospect base, leadership, sector-focus, and structure are among the factors a manager must consider when determining the combination of strategies that will make up an organization's revenue generation efforts. This course will provide students with an introduction to development, an overview of fundraising processes and systems, and the framework through which managers can determine the efficiency and effectiveness of various tactics within a nonprofit organization's private revenue stream. Students will understand the role of the staff and board in a development program, gift packaging, and donor development strategies.

#### **Course Objectives**

- 1. Students will understand the role of fundraising within an organization and the components of a strategic development program. Students will be introduced to fundraising strategies and tactics, and will understand how these strategies fit into the annual development program and for special purposes such as the capital campaign.
- 2. Students will understand the relationship between funders and nonprofits, as well as the changing expectations of donors. They will be introduced to donor strategy development, from prospecting to gift-close.
- 3. Students will be introduced to budgeting and staffing models, industry standards, concepts of fundraising efficiency, and ethics in the field of fundraising.

#### **Class Notes**

#### **Required Text:**

- Eugene R. Tempel, Hank Rosso's Achieving Excellence in Fundraising Second Edition, Jossey Bass
- Ken Burnett, Relationship Fundraising: A Donor-Based Approach to the Business of Raising Money, 2<sup>nd</sup> Edition, Jossey Bass
- · Other assigned reading to be provided

## **Grading:**

Written Assignments: 20%Groupwise Participation: 10%Group Assignment: 15%

Final Project: 35%Class Participation: 20%

Attendance is required. To pass the class, students cannot miss more than one session.

All written assignments must be prepared in Arial, Times New Roman, or Calibri font, 11 point, 1.5 line-spacing, with 1 inch margins all around. Unless otherwise instructed, written assignments are to be turned in by midnight on the day they are due to allank@newschool.edu

#### Section 1: Fundraising, Philanthropy, and Nonprofit Organizations

## **August 30: Introductions and Overview**

Student introductions, Course Overview, Fundraising and Nonprofit Organizations

# September 6: No Class

## September 14: Fundraising and Philanthropy

Growth of US philanthropy and current landscape, New American Donor, Seven Faces of Philanthropy Pre-Reading: 10 Nonprofit Funding Models, The Stanford Social Innovation Review; Tempel Chapters 1-3

# **September 20: The Development Program**

Budgeting, The Annual Fund, Special Campaigns, Development Planning Reading: Tempel Chapters 8-12

#### **September 27: Roles and Responsibilities**

Fundraising pyramid, roles and responsibilities (dev staff, non-fundraising staff, volunteers, consultants), annual plans Pre-Reading: Tempel Chapters 23-25; *Rich Harvard, Poor Harvard* 

#### Section 2: Individual Giving

## **October 4: Direct Response**

Direct Marketing, Direct Mail, Online Fundraising, Ephilanthropy Reading: Tempel Chapters: 13, 19, 20, 22

#### October 11: Major Gifts I

The Major Donor, The Role of Major Gifts, Identifying and Researching Major Donors, Major Donor Portfolios Reading: *Bank of America 2009 Study on High Net Worth Philanthropy; The Wired Wealthy,* Convio; Tempel 9-17

## October 18: Major Gifts II

Moves Management Solicitation Techniques

Assignment: Solicitation Brief (due October 25, 10%)

## October 25: Planned Giving

Bequests, Life Income Gifts, As Low and Middle Donor Strategy, As Part of Major Gift Program Reading: *Creating a Planned Giving Program...*onPhilanthropy; additional to be assigned

Group Project Assigned (due December 6, 15%)

## **November 1: Special Events**

Event Types, Honorees and Host Committees, Sponsorships and Tickets, Cost Considerations Reading: Tempel Chapter 21; Charity Navigator *Special Events Study* 

#### Section 3: Institutional Giving

## **November 8: Foundation Fundraising**

Types of foundations, foundation relations, grant-seeking

Reading: Tempel Chapter 15

Assignment: Prospecting (due November 16, 5%)

## **November 15: Corporate Fundraising**

Corporate foundations, cause-related marketing, corporate social responsibility

Reading: Tempel Chapter 14

Assignment: Your Brand (due November 23, 15%)

## Section 4: Strategic Development

## **November 22: Fundraising Materials, Cost Efficiencies**

The Case for Support, Grantsmanship

Reading: Tempel Chapter 6; Review websites for Guidestar, Charity Navigator, AAFRC; NY Times Giving section

## November 29: International Perspectives, Diversity and Ethics

**Case Studies** 

Reading: Tempel Chapter 30; Council on Foundation Diversity Brief Select 1: Native American Philanthropy – Expanding Social Participation and Self-Determination; Reflections on Endowment: Building in the African American-Community; Latino Philanthropy: Expanding the US Models of Giving and Civic Participation; Asian-American Philanthropy: Expanding Circles of Participation

#### **December 6: Group Presentations**

• Final Project Assigned (Due December 18, 35%)

## **December 13: The Changing Face of Philanthropy**

International Giving, Venture Philanthropy, Transfer of Wealth, Alternative Financing Reading: Tempel Chapter 32, Foundation Center International Giving Report