Course Description and Objectives
This is a ten-week, undergraduate/graduate-level course intended for students and professionals interested in learning the basics of fundraising (development). We will explore the foundational theories and practices of development, as well as the major aspects of a fundraising plan: major gifts, capital campaigns, annual funds, planned giving, grants, and special events. This course will give students tools and strategies for effective fundraising.

By the end of the course, students will have developed a unique nonprofit fundraising plan. This course intends on meeting four main objectives:

- Understand and properly use fundraising terms.
- Analyze and evaluate the fundraising strategy adopted by one nonprofit organization, and suggest improvements to the organization.
- Write a fundraising plan for a nonprofit organization.
- Show ability to implement the AFP Codes of Professional Conduct.

Required Course Readings & Materials
- Weekly lectures and updates from course instructor on Moodle (UM learning management system)
- Readings and videos on Moodle
- Discussions with classmates on Moodle

Assignments
Grading Discussion Board Posts & Responses (20 points every other week)
The discussion board serves as our classroom. It is where we can engage and share ideas and insights. The only way to really learn from the class is to fully engage with your peers. Please take the time to clearly articulate your posts, using correct grammar and spelling. For full credit, make sure to utilize the readings and materials for the week. Ideally, responses to the discussion questions are around 100-200 words (for reference, one page in 12 pt font and double-spaced is about 250 words) and include ideas and references from the week’s readings.

You must reply to the initial discussion question by Wednesday night in order to give time for thoughtful 3 responses. Each student must include at least (2) substantive reply (around 50 words) to a
peer’s comment by **Sunday night**. Make sure to utilize readings in these posts as well. It is expected that
each student will help foster a collegial learning environment by sharing their experiential and academic
knowledge and practices, as well as respectfully listening to the viewpoints of others. Treat these
interactions as you would an in-class, face-to-face conversation.

**Fundraising Plan**
This is a five-part project that culminates with the final fundraising plan.

**Part 1: Introduction (10 points):**
Time period addressed in the plan, author (your name), name, mission, and brief description of the
organization, and why you selected the organization (10 points)

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<th>Proper Format (size 12 font, 1 inch margins, legible font, organized, headers if needed)</th>
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<tbody>
<tr>
<td>Content: Time period, Author, Name , Mission, Description, and Why of Org</td>
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<td>Well organized prose, grammatically correct, proper use of citations</td>
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**Part 2: SWOT analysis(50 points):**
Identifying Strengths, Weaknesses, Opportunities, and Threats, and for fundraising for your organization
(50 points). Include a revised Part 1 in addition to Part 2.

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<tbody>
<tr>
<td>Content: introduction, <strong>SWOT</strong>, conclusion</td>
<td>30 points</td>
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<tr>
<td>Well organized prose, grammatically correct, proper use of citations</td>
<td>10 points</td>
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**Part 3: Fundraising Goals and Calendar (50 points):**
Use the excel sheet template in Week 4 to create your Fundraising Goals and Calendar. Include a revised
Part 1 and 2 in addition to Part 3.

| Goals- **SMART goals** that are clear, organized, and make sense to a reader outside the organization | 25 points |
| Calendar- clearly organized calendar with dates for fundraising and events | 25 points |

**Part 4: Fundraising Analysis (50 points):**
Understanding what’s effective in a fundraiser is an important component and takeaway from the class.
For this assignment, you should pick a fundraiser from your chosen organization to analyze in 3-5 pages
double spaced. Include a revised Part 1,2, and 3 in addition to Part 4. Your analysis should include:

1) **Introduction:** Introduce the event/fundraiser you will be analyzing, why you selected this
fundraiser, and a brief history and goals of the fundraiser (15 points)

2) **Examination:** What did you learn about the organization from the fundraiser? What were the
pros and cons of the fundraiser? Did they meet their intended goals? Why or why not? How
does this compare to their past fundraisers if this is a reoccurring event? Make sure to use
readings from the semester in your analysis. (20 points)
3) Conclusion: What suggestions or changes would you make to the fundraiser? What would you emulate if you were doing a similar event? Use references to the readings to support your recommendations (15 points)

**Part 5: Final Fundraising Plan (100 points):**

For Final Project:
- Executive Summary: one-page summary of the main proposals in the fundraising plan, must use in-text citations to reference course readings (25 points)
- Table of Contents: detail of key sections and sub-sections (5 points)
- Other revised components from the class including your Cover Page, SWOT, Fundraising Goals and Calendar, and Fundraiser Analysis. You may also choose to include a budget modeled in Week 5 (15 points)
- Key Fundraising Strategies (overall direction, positioning, case for support) (25 points)
- Tactical plans (individual giving, major gifts, corporate giving, and trust/foundation) [helpful link in identifying donors] (25 points)
- Conclusion- a paragraph wrapping up the assignment, including next steps for the organization (5 points)

**Total Points for the Class**

<table>
<thead>
<tr>
<th>Component</th>
<th>Points</th>
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<tbody>
<tr>
<td>Discussion board posts &amp; replies</td>
<td>5 x 20 points = 100 points</td>
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<tr>
<td>Part 1: Introduction</td>
<td>10 points</td>
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<tr>
<td>Part 2: SWOT analysis</td>
<td>50 points</td>
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<tr>
<td>Part 3: Fundraising Goals and Calendar</td>
<td>50 points</td>
</tr>
<tr>
<td>Part 4: Fundraiser Analysis</td>
<td>50 points</td>
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<tr>
<td>Final Fundraising Plan</td>
<td>100 points</td>
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<td><strong>Total</strong></td>
<td><strong>360 points</strong></td>
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**Grading Scale**

The University of Montana uses the Plus/minus grading system and a Credit/No Credit system (the CR/NCR replaces the Pass/Fail system used in the past). General education courses must be taken using the traditional letter grade to count toward one's general education requirements. To accommodate the Plus/Minus system the grading scale shown below will be used.

Grade Point Scale

- A 93-100
- A- 90-92
- B+ 87-89
- B 83-86
- B- 80-82
- C+ 77-79
- C 73-76
- C- 70-72
- D+ 67-69
- D 63-66
- D- 60-62
- F 59 or lower

Please Note:

*I try to make this syllabus as complete and correct as possible. I do reserve the right to make any necessary changes. If that happens, I will let you know via Monday Update/email.*
Course Expectations

Participation
Students are expected to fully engage and participate in this course. While the course is online, and is asynchronous, students should be prepared to check Moodle daily, read email, and post in the discussion board by replying to each discussion and commenting to another two students (with meaningful replies). You must post an initial answer by Wed. of each week and a reply on each question by the next Monday.

Holiday
During this course, we encounter several holidays. With online learning, we do not take “time off” for those holidays. It is your responsibility to know the due dates, and to get your work done for that week.

Cultural or ceremonial leave allows excused absences for cultural, religious, and ceremonial purposes to meet the student’s customs and traditions or to participate in related activities. To receive an authorized absence for a cultural, religious or ceremonial event the student or their advisor (proxy) must submit a formal written request to the instructor. This must include a brief description (with inclusive dates) of the cultural event or ceremony and the importance of the student’s attendance or participation. Authorization for the absence is subject to approval by the instructor. Appeals may be made to the Chair, Dean or Provost. The excused absence or leave may not exceed five academic calendar days (not including weekends or holidays). Students remain responsible for completion or make-up of assignments as defined in the syllabus, at the discretion of the instructor.

Submitting Assignments
Be sure to format your paper with name, course, and date in APA format. All assignments should be submitted through the learning unit tab. Assignments will not be accepted via email. Assignments are due by 11:59 pm (Montana time) on the specified due date. PLEASE NOTE: Late assignments will be accepted at the discretion of Dr. Goldman. Points will be deducted for late assignments.

References
You will be required to use appropriate peer-reviewed references in your work. Please use APA Style Manual when referencing work.

Course time and preparation
Students can expect to spend approximately 6-8 hours per week on this course.

MPA Portfolios
If you are using any assignments from this course for your final MPA portfolio, it is your responsibility to keep track of individual grades and professor feedback. Use your computer’s “snipping tool” or screenshot to capture graded feedback to save with your files. We ask that you very carefully read the MPA Portfolio requirements listed on our website (e.g. no you cannot use outlines or case write ups). We ask that you be mindful of individual and group projects you participate in each semester so you stay on track – we appreciate you doing so. Each DPAP professor will always offer an option to complete projects on your own. If questions, contact the MPA Director.

Using Moodle
Since this is an online course, each student should check our course site once per day. Here is the link for Moodle access. Call UM Online by phone, (406) 243-4999 or email umonline-help@umontana.edu if technological problems arise.

University Notes/Policies:

Writing Center
The University of Montana Writing Center is a great resource to review written assignments and readily available to best meet the needs for online and in-person students. Please set up an appointment in advance for staff to review your work before assignments using this link.

Request for Withdrawal
Please see the Student Support Services at UM Online for information on withdrawing from courses and on refund policies. Students are responsible for reading and understanding the full UM policy on Withdrawal from the University. (Please note- I do ask that you just contact me to let me know you are thinking of withdrawing).

Student with Disabilities
The University of Montana assures equal access to instruction through collaboration between students with disabilities, instructors, and Disability Services for Students. If you have a disability that adversely affects your academic performance, and you have not already registered with Disability Services, please contact Disability Services in Lommasson Center 154 or 406.243.2243. I will work with you and Disability Services to provide an appropriate modification.

Land Statement
The Salish Cultural Council created the language, "The University of Montana acknowledges that we are in the aboriginal territories of the Salish and Kalispel people. Today, we honor the path they have always shown us in caring for this place for the generations to come."

Student Conduct Code
The Student Conduct Code, embodying the ideals of academic honesty, integrity, human rights, and responsible citizenship, governs all student conduct at The University of Montana-Missoula. You are expected to adhere to this code.
It is also expected that each student will help foster a collegial learning environment by sharing his or her experiential and academic knowledge and practices, as well as respectfully listening to the viewpoints of others and following basic netiquette rules. You are expected to complete all reading assignments so that you can discuss them intelligently in discussion forums, individual assignments, and small group (collaborative) assignments.

Plagiarism
Acts of cheating or plagiarism will result in a grade of zero (0) for the assignment. Moreover, acts of plagiarism will also be reported to the Academic Court. To avoid acts of plagiarism, cite each reference or source you use and give proper credit for the ideas, opinions, and findings of others. When you are using the exact words of others, you must use quotation marks and include the page number where you found the quote in your citation.
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<thead>
<tr>
<th>Week</th>
<th>Topic</th>
<th>Watch/Listen/Read</th>
<th>Submission</th>
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| Week 1   | Course Overview Introduction to nonprofits & the fundraising profession | **Read:**  
1. Chapters 1 & 2 (Sargeant & Shang)  
**Watch & Listen:**  
1. Instructor welcome to class  
2. Week 1 lecture | **Discussion Board:** Introduce yourself and get to know your peers.  
Initial post due 5/13 by 6 p.m. MST Reply to peers due 5/16.  
LIVE syllabus review and [zoom](#) session with fellow students **Wednesday, May 13th at 6pm** |
| Week 2   | Understanding individual donor behavior/motivations            | **Read:**  
1. Chapters 4 & 5 (Sargeant & Shang)  
2. 7 Faces of Philanthropy article  
3. Suggested skim Resources on Federal Tax law  
**Watch & Listen**  
TEDx talk: How to motivate people to do good for others | **Assignment:** Part 1: Introduction due 5/24 by midnight |
| Week 3   | Fundraising Audit                                             | **Read:**  
1. Chapters 6 & 8 (Sargeant & Shang)  
2. Fundraising Audit Questionnaire  
3. Nonprofit Audit Guide  
**Watch & Listen:**  
Week 3 lecture-SWOT | **Discussion Board:** Now that you have picked your organization for your fundraising plan, where are you now, where do you want to be, and how will you get there? |
| Week 4   | Fundraising Plan                                              | **Read:**  
1. Chapter 7 & part of Chapter 9, stopping at page 214 before Benchmarking section begins (Sargeant & Shang)  
2. 5 Strategic Fundraising Calendar Tips (online) | **Assignment:** Part 2: [SWOT analysis](#) due 6/7 by midnight |
| Week 5 | June 8th-14th | Annual Giving, Online Fundraising, & Events | **Read:** | **Discussion Board:**
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<td></td>
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<td></td>
<td>1. Chapters 10, 11, &amp; 19 (Sargeant &amp; Shang)</td>
<td>What events and fundraisers are planned for your organization? What are some ideas you can implement based on the readings?</td>
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<td>3. Skim Disaster Recovery fundraising</td>
<td>Please schedule a time to meet with Dr. Goldman to discuss the progress of your project.</td>
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<td><strong>Watch &amp; Listen:</strong></td>
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<td>Week 4 lecture with Alysha Goheen</td>
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<td><strong>Read:</strong></td>
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<td><strong>Watch &amp; Listen:</strong></td>
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<td>Week 5 lecture - SMART goals</td>
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| Week 6 | June 15th-21st | Donor Retention & Major Giving | **Read:** | **Assignment:**
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<td>1. Chapters 12 &amp; 13 (Sargeant &amp; Shang)</td>
<td>Part 3: SMART Fundraising Goals and Fundraising Calendar (found in Moodle week 5)</td>
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<td>2. Power Questions article</td>
<td>due 6/21 by midnight MST.</td>
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<td><strong>Watch &amp; Listen:</strong></td>
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<td>Week 6 lecture with Kate Jennings</td>
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<td><strong>Read:</strong></td>
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<td><strong>Watch &amp; Listen:</strong></td>
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| Week 7 | June 22nd-28th | Planned Giving & Bequests | **Read:** | **Discussion Board:**
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<td>2. Bequests article</td>
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<td>3. Planned Giving Marketing</td>
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<td><strong>Watch &amp; Listen:</strong></td>
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<td>Week 7 lecture</td>
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<td><strong>Watch &amp; Listen:</strong></td>
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| Week 8 | June 29th-July 5th | Corporate Giving & Grantwriting | **Read:** | **Assignment:**
|---|---|---|---|---|
| Week 9 | July 6th-11th | Ethical Fundraising & Public Confidence | Read:  
1. Chapters 3 & 21 (Sargeant & Shang)  
2. Give.org’s Donor Trust Report (PDF on Moodle)  
3. Ethical Fundraising links(2)  
**Watch & Listen:**  
Week 9 lecture | Discussion Board:  
Building public trust at your organization. Post due 7/8. MST. Reply to peers due 7/11. |
|---|---|---|---|
| Week 10 | July 12th-17th | Special Topics in Fundraising | Read:  
1. Chapter 22 (Sargeant & Shang)  
**Watch & Listen:**  
TEDx talk: How Money Can Buy You Happiness | Assignment:  
Part 5: Final fundraising plan due 7/17 by midnight. |