I. Course Information

A. Course Description: This summer, students will have the opportunity to learn about the integral and critical role philanthropy and fundraising plays in sustaining and growing nonprofits, such as museums, institutions of higher education, environmental, health care and human services organizations. If you are planning a career as a leader in today’s nonprofit sector, this course will provide you with a better understanding of philanthropy and the practical skills to navigate the increasingly complex world of fundraising. Through this course, you will explore emerging philanthropic and fundraising trends; use planning techniques to develop a real or imagined project and evaluate its potential effectiveness, learn about standard and innovative fundraising tools and strategies to address changing funding priorities and application processes. This practical course also provides opportunities to: learn the skills required to engage and obtain support from individual donors, foundations and corporations; learn the basic principles of planning sustainable and collaborative projects, develop a budget for your class project, meet with philanthropists and study the world of philanthropy’s funding, decision making process.

To be successful in this course students must be proficient in using the Internet, comfortable using MS Word, Excel and PowerPoint applications; knowledgeable about basic planning principals and are familiar with rudimentary budgeting concepts. Yes, this is a multi-disciplinary course, so if you do not know Excel, you must be willing to devote at least four hours to learn this skill. Two hours of coaching and instruction and two of self-directed practice is all that it takes.

B. Required Readings: The Foundation Center’s Guide to Proposal Writing (fourth or later Edition) Jane Geever. This text may be purchased from the Bookstore or directly from The Foundation Center, 79 Fifth Avenue, New York, NY 10003-3076. Office Phone: 1.212.620.4230.

Order Code: GPW4 Order Online: https://fdncenter.org/marketplace
Order by Phone: Monday-Friday 9:00 a.m. to 5:00 p.m. Call 800.424.9836

Additional readings to inform our class discussions are listed on the following pages and available on http://trunk.tufts.edu or will be distributed in class. Please check Trunk for updates.

C. Anticipated Outcomes: This course is designed to assist students and nonprofit practitioners in developing a better understanding of, and strategies to engage the private philanthropic sector, including foundations, corporations, and individual donors. The course will provide an overview of the structure of organized philanthropy as well as an understanding of the process of non-profit fundraising and creating development strategies. We expect students to become proficient or to learn new skills, in the areas listed below:

- Understand the driving forces and trends in the world of Philanthropy and Fundraising today;
- Learn the fundamentals of the inclusive planning processes needed to be successful in these fields;
II. Course Content

Please let the professor know if you are planning a career as a foundation or corporate program officer, as a slightly different roster of assignments are available to enhance your skills and theoretical understanding of these fields.

**WEEK 1 - GETTING TO KNOW THE WORLD OF PHILANTHROPY!**

**Tuesday – 6.30.15**

1. **Introductions:** Course overview and student expectations (please complete the survey), Discuss syllabus, assignments and speakers; please come prepared for a brief discussion on the service/program or capital project that you will use to develop a full-proposal, which is your final paper. If you do not have a “real” project for which funding is required—please make one up or ask the instructor for a reference to a nonprofit willing to provide the information you will need to complete a proposal.

2. **Class Discussion:** The History of Philanthropy and its Implications ~ Why Donors Give!

**Readings:**
- (a) Giving USA 2014 Executive Summary visit the link below for a free copy: https://nonprofitquarterly.org/philanthropy/22476-giving-usa-2013-giving-coming-back-slowly-and-different-after-recession.html?gclid=CP0k6MvYkL8CF5xo7AodTQ8AaQ;
- (b) The 2012 Study of High Net Worth Philanthropy, Bank of America & Center on Philanthropy at Indiana University Pages 7-10 and Pages 37-46;
- (c) Class Materials on Trunk: Overview of Philanthropy and Fundraising

**Thursday – 7.2.15**

**GUEST SPEAKER:** Gracelaw Simmons, Associate, GMA Foundations will discuss the role GMA plays as Grant makers, Managers and Advisors in the philanthropic community & her role as a Board member of Royall House & Slave Quarters Museum.

1. **The Philanthropic Environment and Funding Streams**
   - Funding Collaboratives and Affinity Groups
   - Individual Donors
   - Corporate and Foundation Grant Makers
   - Donor Cultivation and Stewardship Activities
   - Special Events

**Readings:**
- Foundation Growth and Giving Estimates 2011 Please download the file from the Foundation Center at the following address http://foundationcenter.org/gainknowledge/research/pdf/fgge11.pdf;
- (b) 2011 Foundation Giving Highlights (Full version available on request) and (c) Key Facts on Family Foundations. **Class Material:** Overview of Philanthropy and Fundraising

**WEEK 2 - CONNECTING WITH DONORS**

**Tuesday – 7.7.15**

1. **Planning & Developing Funding Strategies**
   - The Basics Before You Begin ~ Theory of Change, Strategies & Plans
   - **Class Discussion:** Present your “Elevator Speech”
   - **Class Discussion:** Select the “funding models” which most closely match the organization for which you are seeking funding.

2. **Engaging the Philanthropic Community**
   - Reaching individuals connected to your NPO – Creating opportunities to give
   - Understanding the principals of Reciprocity, Responsibility, Reporting & Relationship nurturing
Class discussion on the implications of Waters’ research findings & 2015 Abila Donor Engagement Study


Thursday – 7.9.15

1. Students will select a partner to complete an in-class exercise on donor cultivation/stewardship
   - Students will complete a prospect worksheet on their partner – Yes, you can be anyone you want to portray = 10 minutes ~ 5 minutes for each partner.
   - Role-play ~ switching roles as Philanthropist and Fundraiser, students will seek their support for their projects. = 10 minutes
   - Each student – playing the role of donor, will present the request made by their partner, their response and why they responded in this way.

Readings: (a) Please read Chapters 2, 5 & 7 of Building Donor Loyalty by Tony Poderis. http://www.raise-funds.com/2003/building-donor-loyalty-chapter-2/ (b) Donald E. Craig, The Tango of Solicitation, “If you know the steps to dance to when asking for the big gift, prospects will follow your lead (article).

Week 3- Connecting with Potential Major Donors

Tuesday – 7.14.15

GUEST SPEAKER: Michael De Lisi ~ Fundraising for Lafayette College, PA ~ Graduate, Philanthropy & Fundraising Class of 2012

1. Approaches to Individual Donors
   - Major Gifts, Giving Circles, Legacy Gifts
   - Point of Entry Programs (POE)
     Class Discussion on: Volunteer and staff roles in the cultivation, request and stewardship processes; plus the basic “Moves” or steps essential to cultivating and soliciting major donors.

2. The Important Role Individual Giving Plays in the Development Process
   - New Developments in the Field of Annual Giving ~ What seems to work and why
   - LOI’s and their changing importance in Individual, Corporate and Foundation Philanthropy

Readings: (a) Jane Geever, The Foundation Center’s Guide to Proposal Writing, Chapter 13; (b) Tom Ahern—Excerpted from Seeing through a Donor’s Eyes: How to Make a Persuasive Case for Everything from Your Annual Drive to Your Planned Giving Program to Your Capital Campaign; (c) Jane Geever, The Foundation Center’s Guide to Proposal Writing, Chapters 1-3.

Approaching Foundation & Corporate Donors

Thursday – 7.16.15

1. Components of a “Winning” Proposal
   Providing the information grant officers need to influence funding decisions on your nonprofit’s behalf.

   - Introductory Sections of a Proposal - The “Cover Page”
   - Organizational Description - History
   - The Organization’s Programs, Strategic Goals, Objectives
   - Demographic Information - The Diversity Form
   - Project Description

Class Exercise: Please come prepared to articulate ONE of your project’s Goals and ONE Objective for which you are seeking funding!

Reading: (a) Jane Geever, The Foundation Center’s Guide to Proposal Writing, Chapters 4-7; (b) Guidance on Goals and Objectives

Class Materials: The Nuts & Bolts of Grant Writing
WEEK 4- FOUNDATION/CORPORATE DONORS CONTINUED

NOTE: Please bring a pad or calculator to this class to complete the personnel/consultant budget.

1. Key Proposal Components . . . continued
   - Need or Problem Statement ~ Finding current statistical information
   - Specific Activities & Timetables
   - Budget

Class Exercise: Connecting your project objectives to the staff/consultants needed and other project expenses you will need to complete your project.

Readings: (a) Jane Geever, The Foundation Center’s Guide to Proposal Writing, Chapters 8 and 9;
Class Materials: The Nuts & Bolts of Grant Writing and (b) Personnel/Consultant Budget Worksheet

2. Completing Your Proposal
   - Evaluation
   - Sustainability and Collaborators
   - Required Attachments ~ Why funders request this information
   - Other information frequently requested by funding sources

Thursday – 7.23.15

GUEST SPEAKER: Klare Shaw, Director of Programs at Liberty Mutual Foundation, Liberty Mutual Insurance. Klare has devoted her 25-year philanthropic career to improving access to education and art for Boston’s youth.

1. Fundamentals of Corporate Giving:
   - Corporate giving is increasingly conducted on-line
   - Develop the Case for Support – but this time, outline how the corporation benefits from a relationship with your nonprofit
   - Relationships: Leveraging or creating relationship in the corporate giving world

SWITCHING ROLES—BEComing A Funder

2. Philanthropy from a Funder’s Perspective: Group Project
   - Students will be divided into groups of 3 to 4 to form a foundation.
   - Each group will select the name of their foundation and will represent a foundation’s review team (a specific amount of funds available for distribution will be provided.)
   - Groups will create their foundation’s mission, at least three funding priorities and three to five project-funding criteria for the specific focus area assigned.
   - Each student in the group will review a short proposal, and will summarize its strengths, weaknesses, and match with the funding criteria developed.

Group Exercise: Develop criteria that you as a funder might use to review an organizations’ background, fiscal health, and the project for which funding is requested.

Reading: Students will be provided with sample proposals, which will be used to make funding recommendations.

WEEK 5—MAKING FUNDING DECISIONS

Tuesday – 7.28.15

Group Presentation: Each group will present their foundation’s mission, funding priorities and the grant criteria sheet developed to review and ‘rate’ proposals to the speaker.

For the remainder of this class:
   - Playing the role of a Foundation Program Officer, each student will develop recommendations explaining why he or she made decisions to fund or not to fund the proposal.
   - Each individual will present their recommendations to the Foundation group and the group will agree on funding recommendations—including amounts—of the grants to be made.

Thursday – 7.30.15

GUEST BOARD MEMBER: Gracelaw Simmons, GMA Foundations, will serve as one of the Board members who will review your foundation’s funding recommendations.
1. **Philanthropy from a Funder’s Perspective:**
   - Each foundation group will present to the Trustees/Board, summarizing their recommendations and answering questions.

   **Group Exercise:** Each Foundation will have 10 minutes to present their recommendations to the Board. The board member(s) present will make the final decision and explain why they do or do not support the decisions presented by the group.

   - The Foundation trustee/board member will discuss the role of foundation trustees/boards and what they consider when making grant decisions.

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**Week 6 – Special Friend and Fundraising Events**

**Tuesday – 8.4.15**

1. **The Role of Special Events in Fund Development**
   - Students will be subdivided into groups to plan the outline of a **Small** event for 100-200 people; **Mid-size** 300-500 people event or **Large Public Gathering** attracting more than 600 people.
   - Planning/organizing events that promote your institution while raising unrestricted funds
   - Integrating “Events” into your overall fund development portfolio, and
   - Determining the best type of event for your institution

   **Reading:** (a) The Essential Steps for Launching a Successful Fundraising Event; (b) Download [http://www.librarysupport.net/librarylovers/eventips.html](http://www.librarysupport.net/librarylovers/eventips.html) Planning Special Events: Blueprint for Success by Debora Meskauskas

2. **Fund Raising versus Friend Raising Events**
   - Guided Discussions: Putting the “Fun” back into Fundraising, as a way to build relationships with prospects and donors or strengthen relationships between Foundation Trustees & Officers
   - Using “Events” as a part of your Point of Entry Program for Major Donor Cultivation
   - Events as Stewardship Opportunities

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**B. Course Format:**

This course includes lectures, guided discussions, group work, student presentations, demonstration and practice sessions, structured exercises, partnered role-play, a review of successful proposals, foundation guidelines and other emerging funding criteria. Other course expectations include:

1. **Tolerance of Varied Learning Styles:** The primary expectation is that you have signed up for this course to become knowledgeable about current trends in philanthropy and to acquire the skills to use this knowledge effectively. To achieve this goal: a) Please be patient with your classmates, b) all questions are welcomed and encouraged, as these will enhance your learning experience, and c) if you do not understand class materials, lectures, or discussions, it is imperative that you speak with the lecturers immediately to obtain clarity.

2. **Class Participation:** Twenty five percent of your grade will be based on class participation, which is defined here as being present and actively ‘participating’ in class discussions. Five percent is based on reading assigned materials, as evidenced by your ability to discuss these materials in class and to engage guest speakers. If you are unable to attend class, please let us know during class break-time, or contact Deandra Robinson in Pat Bonner-DuVal’s office, to let her know. Deandra may be reached at [Deandra@Bonnerent.com](mailto:Deandra@Bonnerent.com) or by phone at 617-232-5453.

3. **Written Assignments:** Assignments are an integral part of the learning experience that will enable you to navigate the world of philanthropy and fundraising, successfully. Written assignments account for 70% of your grade, as detailed below. If you do not clearly understand an assignment, please speak with the lecturers before the assignment is due. Late assignments will reduce your grade. If you submit fewer assignments than required, your grade will reflect the number of assignments submitted.
III. Written Assignments

The Ground Rules: Written assignments are due at the beginning of the classes noted below (and when requested may be e-mailed directly to the instructor). Thank you for completing and submitting assignments on time. To avoid losing 0.5% on each assignment submitted after the due date; please communicate with the instructor in advance. Assignments should not exceed the requested page limit and should be:

- Typed in any 12-point font, that is approximately the size of this text or larger.
- All margins should be one inch and all pages should be numbered.
- Text must be one-and-a-half spaced. Quotes, bullets, and lists may be single-spaced.
- Your name, the name of your instructor, and the date must appear on all papers.
- Cover sheets, footnotes, endnotes, and requested exhibits are not included in the page length limits.
- Please do not submit brochures, CDs, or other supporting materials that are not requested as a part of the papers assigned.

If You Do Not Have a Specific Project in Mind for Which You Are Seeking Funding, Please Be Imaginative and Create a Project and Organization. For an additional 3% points, you may undertake a project with a real community-based organization. To pursue this option, please speak with Professor Pat during the first week of class. Thank you!

#1 DUE on July 2, 2015 – Briefly Describe Your Project/‘Elevator Speech:’ = 2%

Pretend you are in an elevator with an important funder. Use 250 characters to describe your project. Foundation staff and individual donors need to quickly understand your project and concisely describe your request to others. If you are requesting funding for operating support, briefly describe the organization’s services supported. If you are seeking capital funds, describe the project’s impact on the target populations served. Be prepared to read or present this description to the class.

#2 DUE on July 9, 2015 – Funding Plan and Strategies: = 5%

Using the descriptions of the Nonprofit Funding Models, develop a one-page action table outlining the strategies you might pursue to raise funding for your project. Please use the Sample Planning Table provided. Regardless of the project you have chosen for this class, please include INDIVIDUAL approaches, as an integral part of your funding strategy.

#3 DUE on July 14, 2015 – Cultivating Individual Donors = 5%

Using your discussion in class with your “partner,” write a letter seeking support from a past individual donor, which will not exceed 2 pages. Outlining ways in which you might engage them in this project. Include two or more of the following methods—as a volunteer, donor, advisor and/or partner in fundraising, in this letter. This letter may also be formatted as an email. Also, prepare a one-page summary of the sequence of activities or “MOVES” you might take to cultivate and ask a prospect for a major gift. Attach the prospect worksheet completed during class.

These are the only documents that you may choose to single space!

In addition, please email ONE class project Goal and ONE Objective for which you are seeking funding. Please send this Email to Deandra@Bonnerent.com.

#4 DUE on July 16, 2015 – Introducing Your Program or Project to a Funder: = 10%

Write and submit an Executive Summary or Concept Paper for use with a foundation or corporate donor. Use the format provided in the Foundation Center’s Guide to Proposal Writing. Please use
topic headings to delineate each segment of your summary, which should not exceed three pages. Outline the strategies you will use to engage Board, staff and volunteers in the introduction, grant submittal, follow-up and acknowledgement process. This should not exceed one page. (Assume that you will shortly receive an invitation to submit a full proposal.)

#5 DUE on July 23, 2015 Part I of Your Proposal = 10%
Using the Associated Grant Makers’ Common Proposal Format for a Full Proposal, complete the Organizational Information narrative section, contained in questions 1 to 4. Please condense your responses to five-pages spaced at 1.5. It is not necessary to type your responses into the AGM guidelines, use the topic headings to present your information on a MS Word document.

#6 DUE July 28, 2015– Submit Your Individual Funding Criteria =5%
This assignment is both an in-class group and individual assignment. Using information gleaned from class discussions, readings and presentations from our guest speakers envision yourself as a philanthropist, and create a one-to-two page list of the attributes foundation staff, Trustees, or Board members might use to make funding decisions. Develop a criteria rubric for the topic headings provided in the Associated Grant Makers Common Proposal Format for a Full Proposal. Examples will be discussed during the class.

# 7 DUE on July 30, 2015– Submit Summary of Recommendations for Funding = 13%
Again, this is both a team and an individual assignment, the majority of which will be completed during class on 7/29/2014. After reviewing the proposal presented, create a summary of the proposal’s strengths and weaknesses and work with group members to reach consensus on a funding recommendation. You will have the opportunity to present your recommendations to a Board of one or more funders and will submit this group assignment following your presentation. PLEASE PRINT AND BRING TWO COPIES OF THIS ASSIGNMENT WITH YOU to class on 7/30/2015! Thanks

# 8 DUE on August 6, 2015 – FINAL PAPERS = 20%
Using the Associated Grant Makers’ Common Proposal Format for a Full Proposal, complete the Project Information narrative section, contained in questions 5 to 10. Please condense your responses to four-to six-pages spaced at 1.5. Not included in this six-page limit are: a) your budget, b) a budget narrative, and a one-page attachment list. Please note beside each attachment listed summary information explaining why funders request these attachments.

IV. GUEST SPEAKERS
I have invited professionals in the field to speak in class, as noted in the course content, on the dates they will present. I will remind you in advance, so that you can complete on-line research to learn about the organizations they represent. Guests may accompany the instructor or arrive close to the beginning of class. Being on time when meeting with a potential funder or development professional is critical to your success as a nonprofit leader. A list of confirmed speakers in included in this syllabus.

V. GRADING
Everything you do in this class counts - class participation, reactions and responses to readings, oral presentations in class, and written work. This grading practice reflects my teaching philosophy: I am working to create a learning experience for us all. Everything you do contributes to this learning experience and is valued. Every way that you do not contribute - by being unprepared, failing to submit papers when requested, being silent while others contribute to class discussions, falling asleep, or not attending class at all - diminishes the experience for all participants.
Your grade will be weighted as follows: 25% class participation, 5% presentations, 70% written assignments and final paper. All requests for extensions must be made in person, or by email. Please note extensions are not available beyond the date when grades must be submitted, you will be graded on the assignments submitted.

In evaluating papers, I will look for clear, well-written, and well-edited prose. Papers should be organized carefully with arguments that are clearly and succinctly framed. As some assignments cover sections of a full proposal, please use the topic headings provided in the guidelines, when completing grant writing proposal assignments. Please do not just launch into your paper as this leaves the reader hanging. Integrate readings, as well as other research when required, to support and illustrate your arguments. The assignments are deliberately short. Do not mistake that for quickly accomplished. In the philanthropic world, successful communications are brief, crisp, clear, and to the point. If English is your second language, please let me know, early in the class. If I find that you are weak on grammar, I will tell you and will expect improvement over the term. I may also suggest you contact the Academic Services Center.

PLEASE NOTE THAT SHOULD THE NEED ARISE, I WILL ORGANIZE CONFERENCE CALLS FOR SMALL GROUP REVIEW OF CAPITAL CAMPAIGNS, BUDGETING, AND EVALUATION CONCEPTS. We will discuss the need for these services in class, at which time we will set dates in advance. If you need additional help, time outside of class is available. Please schedule these dates during class or call my assistants, Deandra at 617-232-5453, to schedule private time.

--THE END--