

**University of North Texas at Dallas**  
**Spring Semester 2017**  
**SYLLABUS for Distance Learning**

**PLDR 5325: Fundraising Principles and Grant Writing**  
**3 Credit Hours**

|   |   |                  |                                   |
|---|---|------------------|-----------------------------------|
| <b>Department of</b>  | <b>Public Leadership</b>  | <b>School of</b> | <b>Liberal Arts &amp; Science</b> |
| <b>Instructor Name:</b>   | Dr. Janiece Upshaw  |                  |                                   |
| <b>Office Location:</b>   | FH303   |                  |                                   |
| <b>Office Phone:</b>  | 972.338.1538  |                  |                                   |
| <b>Email Address:</b>   | <a href="mailto:janiece.upshaw@untdallas.edu">janiece.upshaw@untdallas.edu</a>  |                  |                                   |
| <b>Office Hours:</b>  | <b>Monday – 2:00 – 5:30</b><br><b>Wednesday – 10:00 – 12:00</b><br><b>Thursday 2:00 – 4:00</b><br><b>By appt.</b>   |                  |                                   |
| <b>Classroom Location:</b>  | FH303   |                  |                                   |
| <b>Class Meeting Days &amp; Times:</b>  | Saturdays 9:00 a.m. – 2:50 pm (See syllabus p.2 for Face-to-Face vs. Online schedule)   |                  |                                   |
| <b>Course Catalog Description:</b>  | Fundraising Principles & Grant Writing: A practical understanding of advanced concepts, techniques and theories of fundraising for nonprofit and community leaders; including the preparation of an effective grant application   |                  |                                   |
| <b>Prerequisites:</b>   | PADM 5020, PADM 5030, PADM 5400, PLDR 53XX, PLDR 5320, PLDR 5330 PLDR 5300, PLDR 5310   |                  |                                   |
| <b>Required Text:</b>   | Sargeant A., Shang J, and Associates (2010) <i>Fundraising Principles and Practice</i> , Jossey Bass, San Francisco. ISBN 978-0-470-45039-0   |                  |                                   |
| <b>Access to Learning Resources:</b>  | UNT Dallas Library:<br>phone: (972) 780-1616<br>web: <a href="http://www.untdallas.edu/library">http://www.untdallas.edu/library</a><br>email: <a href="mailto:library@untdallas.edu">library@untdallas.edu</a><br>UNT Dallas Bookstore:<br>phone: (972) 780-3652<br>web: <a href="http://www.untdallas.edu/bookstore">http://www.untdallas.edu/bookstore</a><br>e-mail: <a href="mailto:untdallas@bkstr.com">untdallas@bkstr.com</a>                                     |                  |                                   |
| <b>Course Goals or Overview:</b> The goals of this course are as follows -                |   |                  |                                   |
|   | <ol style="list-style-type: none"> <li>1. To understand and critically evaluate how the voluntary sector solicits funds from individual, corporate and foundation donors</li> <li>2. To apply a wide range of tools, models and frameworks to solve practical fundraising problems</li> <li>3. To analyze and evaluate a fundraising strategy</li> <li>4. To analyze and evaluate the legal and ethical implications of various forms of professional practice</li> </ol> |                  |                                   |
| <b>Learning Objectives/Outcomes:</b> At the end of this course, students will be able to: |   |                  |                                   |
| 1   | Understand and implement the Institute of Fundraising/AFP Codes of Professional Conduct   |                  |                                   |
| 2   | Develop a fundraising plan for a charity or other nonprofit organization  |                  |                                   |
| 3   | Understand the nature and process of fundraising strategy development, both in relation to the solicitation of new donors and the retention and development of existing donors  |                  |                                   |
| 4   | Apply a disciplined approach to the analysis of various complex fundraising problems and their resolution through the selective and appropriate use of tools for analysis and strategy formulation  |                  |                                   |
| 5   | Produce a grant for a nonprofit organization in the Dallas community.   |                  |                                   |

## Online/Hybrid Course Outline

This schedule is subject to change by the instructor. Any changes to this schedule will be communicated in class or via class email or Blackboard announcement. Additional readings and activities may be added, these will be noted in the Readings and Activities/Assignments sections.

| Schedule   | Topic   | Activities   | Due Date  |
|--|---|--|---|
| Week 1<br>Jan. 17 - 22<br><b>Class Jan 20</b><br><b>9:00 – 2:50 p.m.</b>   | Review of<br>Syllabus/Assignments<br>Introduction to the<br>Nonprofit/Charity Sector<br>Legal/Ethical Aspects of<br>Fundraising<br>Case Statement | Chapter 1, 3<br>Inspirational Videos<br>Personal Philanthropy of Giving<br>Case Statement  | .   |
| Week 2<br>Jan 23- 29<br><b>Online</b>                                      | Individual Giving Behavior<br>Case for Support<br>Donor Recruitment,<br>Development & Retention   | Sargeant, Shang & Associates<br>Chapters 4, 8, 12<br>Garecht, J. (2013). How to Write a<br>Case for Support for Your Non-<br>Profit (Part II). (Handout, Week 1) | Quiz: Due by Jan. 28, 9:00 a.m.<br>Inspirational Videos Due by Jan.<br>29, 11:59 p.m.<br>Upload to Inspirational Videos<br>under Course Content |
| Week 3<br>Jan. 30 – Feb.5<br><b>Class Feb 3</b><br><b>9:00 – 2:50 p.m.</b> | Quiz: Chapters 13, 16, 17<br><br>Major Giving<br>Corporate Giving<br>Grant Writing  | Sargeant, Shang & Associates<br>Chapters 13, 16, 17,   | Case Statement Due Feb 4 @<br>11:59 p.m.<br>Bring Hard Copy to Class for<br>Peer Review<br>Submit online copy by                                |
| Week 4<br>Feb. 6 - 12<br><b>Online</b>                                     | Quiz: Chapters 6, 7<br>Fundraising Plan   | Sargeant, Shang & Associates<br>Chapters 6, 7  | Quiz due Feb. 11 @ 9:00 a.m.<br>Personal Philosophy of Giving<br>Due by Feb 12 at 11:59 p.m.  |
| Week 5<br>Feb. 13-19<br><b>Class Feb. 18</b><br><b>6:00 – 8:50 p.m.</b>    | Quiz: Chapter 9<br>Fundraising Plan<br>Case Study   | Sargeant, Shang & Associates<br>Chapter 9  | Grant due Feb. 18 @ 6:00 p.m.   |
| Week 6<br>Feb. 20 - 26<br><b>Online.</b>                                   |   |  | Fundraising Plan Part I: d, e, f<br>due by Feb. 25 at 11:59 p.m.  |
| Week 7<br>Feb. 27- Mar 5<br><b>Online</b>                                  |   | Sargeant, Shang & Associates<br>Part Four: pp. 489-593<br>Chapters 18-22   | Fundraising Plan Part II: g, h due<br>by Mar. 4 at 11:59 p.m.   |
| Week 8<br>Mar. 6 - 12<br><b>Class Mar 11</b><br><b>9:00 – 2:50 p.m.</b>    | Presentations   |  | Annual Fund Plan Assignment<br>Due: Mar. 11 at 9:00 a.m.<br>Presentation of Fundraising<br>Plan   |

## Course Evaluation Methods

This course will utilize the following instruments to determine student grades and proficiency of the learning outcomes for the course.

- 2 Online Assignments – 25+25 = 50 points (10% of total grade)
- 5 Quizzes – 10 +10 + 10 +10 +10 = 50 points (10% of total grade)
- 3 Projects – 100 + 100 +100 = 300 points (60% of total grade)
- 1 Presentation – 100 points (20% of total grade)

## **Online Assignments**

### **#1 – Inspirational Videos (25 points), Due by January 29, 11:59 p.m. (Found under Course Information Link)**

On the link below, you will find 11 videos produced by nonprofit organizations.

<https://www.classy.org/blog/11-nonprofit-videos-that-inform-and-inspire/>

Watch all of the videos (each video is 2 minutes - 5 minutes in length). Select three of the videos that you find most inspirational and write 1-3 paragraphs on each of the three videos. (Do not write more than 3 paragraphs.) Make sure to answer the questions below in your paragraphs. This should be written as a narrative, not as a question – answer assignment. Submit your paper online to Inspirational Videos Assignment found in the Course Information link on Blackboard.

1. What was compelling about this video?
2. What were the strengths of their storytelling?
3. Does this video inspire you to . . . donate? volunteer? take some action?
4. Did you connect personally/emotionally to this video? In what way?
5. How do you believe this video helps the organization in their fundraising efforts?

Format of paper: Use APA style (title page, 1" margins, 12 pt. Times New Roman font, double-spaced, APA sub-headings, page numeration)

Title: Inspirational Videos

3 Section-Headings - Name of Charity of selected video for each heading

Use APA citations for each video. For help with APA style: <https://owl.english.purdue.edu/owl/resource/560/01/>

| Percentage   | Percentage of Semester Grade | Possible Points | Grade |
|--|------------------------------|-----------------|-------|
| Video 1 - All questions answered clearly and eloquently  |                              | 6               |       |
| Video 2 - All questions answered clearly and eloquently  |                              | 6               |       |
| Video 3 - All questions answered clearly and eloquently  |                              | 6               |       |
| Writing - Good sentence construction; few grammatical errors; limited use of first person; written in active (rather than passive) voice |                              | 4               |       |
| APA Style - title page, headings, font, spacing, citations (see APA handbook or Owl Purdue APA website for examples/guidelines)          |                              | 3               |       |
| Total  |                              | 25              |       |

### **#2 Develop a Personal Philosophy of Philanthropy (25 points) – Due February 12, 11:59 p.m. (Found under Course Information Link)**

Use the “Developing a Personal Philanthropy Plan to help you define what elements are important to you when you consider charitable giving. Imagine that you have a family foundation. Write a personal philanthropy plan in the style of the three samples provided: Include a mission statement and Guiding Principles. Submit your plan online.

#### **Projects:**

1. **Case Statement (100 points) – Due Feb 4**
  2. **Grant (100 points) – Due February 18**
  3. **Annual Fundraising Plan (100 points) – Due March 11**
    - a. **Annual Fundraising Plan Part I (d,e,f)– Due Feb. 25**
    - b. **Annual Fundraising Plan Part II (g,h) – Due Mar 4**
    - c. **Final plan, includes all sections & Case for Support – Due March 11**
- Presentation (100 points) – March 11**

### **Case Statement:**

Read Chapter 8 of your textbook to thoroughly understand the purpose of Case For Support (aka Case Statement or Case Expression). Use the following articles “How to Write a Case for Support for your Non-Profit” as a guideline for your outline. You will be provided samples and others tips in class.

| <b>Criteria</b>  | <b>Possible Points</b> |
|--|------------------------|
| Does this case expression clearly demonstrate how the organization meets a need in the community?          | 15                     |
| Does this case expression position the organization as a problem solver or “opportunity” in the community? | 15                     |
| Does this piece demonstrate how the community benefits from our work?                                      | 15                     |
| Does this piece demonstrate our organization’s distinctiveness?  | 10                     |
| Is the money needed to make the change, fix the problem, or pursue the opportunity clearly stated?         | 10                     |
| Does the piece give clear instructions on how to make a charitable contribution?                           | 10                     |
| Does the piece persuasively show the benefits that donors receive from making contributions?               | 10                     |
| Writing (Grammar, Spelling, Style)   | 5                      |
| APA  | 5                      |
| Presentation (organized/appealing)   | 5                      |
| <b>Total Points</b>  | <b>100</b>             |

**Annual**

### **Fundraising Plan:**

You are required to produce a fundraising plan for the annual fund of a nonprofit or charitable organization of your choice.

Your annual fund plan should be written in order to be read and implemented by a senior member of the management team. It is thus a practical document that should utilize the theory you will learn during the course to inform the analysis you undertake. While this is a practical document you must still reference any course material or ideas that you use in your plan.

Use the following guidelines to structure your assignment.

- a) Cover Page – to include title, time period addressed in the plan, author, name of organization/product and, if appropriate, any confidentiality restrictions.
- b) Executive Summary – one page summary of the main proposals in the fundraising plan
- c) Table of Contents – detail of key sections and sub-sections.
- d) Vision/Mission
- e) Organizational Objectives
- f) Fundraising Audit (PEST analysis, competitor analysis, collaboration analysis, market analysis)
- g) SWOT Analysis
- h) Fundraising Objectives
- i) Fundraising Strategies (Overall direction, segmentation targeting, positioning, Case for Support)
- j) Tactics (Individual – direct response, individual – major gift, corporate, trust/foundation)
- k) Budget/Schedule
- l) Monitoring/Control
- m) Appendices (if applicable)

Your approach throughout should reflect the highest standards of professional practice and should be guided by the AFP code of ethics.

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|          |                 |
|----------|-----------------|
| Criteria | Possible points |
|----------|-----------------|

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|--|-----|
| Part I turned in complete and on time                                  | 5   |
| Part II turned in complete and on time                                 | 5   |
| Vision/Mission   | 5   |
| Specification of Fundraising Objectives                                | 5   |
| Fundraising Audit (Pest, competitor, collaboration, & market analysis) | 10  |
| SWOT Analysis  | 10  |
| Specification of Fundraising Objectives                                | 10  |
| Specification of Fundraising Strategies                                | 10  |
| Specification of Fundraising Tactics                                   | 10  |
| Specification of budget/schedule                                       | 10  |
| Clarity of Monitoring/control  | 5   |
| Follows AFP Code of Ethics   | 5   |
| Quality and appropriateness of plan/Well written                       | 10  |
| Total  | 100 |

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**Grading Matrix:**

| Activities/Assignments | Value (points) | TBA         |
|------------------------|----------------|-------------|
| Online Assignments     | 50             | 10%         |
| Quizes                 | 50             | 10%         |
| Case Statement         | 100            | 20%         |
| Grant                  | 100            | 20%         |
| Fundraising Plan       | 100            | 20%         |
| Presentation           | 100            | 20%         |
| <b>Total:</b>          | <b>500</b>     | <b>100%</b> |

**Grade Determination**

**A = 90% or better**

**B = 80 – 89 %**

**C = 70 – 79 %**

**D = 60 – 69 %**

**F = less than 60%**

**University Policies and Procedures**

**Students with Disabilities (ADA Compliance):**

Chapter 7(7.004) Disability Accommodations for Students

The University of North Texas at Dallas makes reasonable academic accommodation for students with disabilities. Students seeking accommodations must first register with the Disability Services Office (DSO) to verify their eligibility. If a disability is verified, the DSO will provide you with an accommodation letter to be delivered to faculty to begin a private discussion regarding your specific needs in a course. You may request accommodations at any time, however, DSO notices of accommodation should be provided as early as possible in the semester to avoid any delay in implementation. Note that students must obtain a new letter of accommodation for every semester and must meet/communicate with each faculty member prior to implementation in each class. Students are strongly encouraged to deliver letters of accommodation during faculty office hours or by appointment. Faculty members have the authority to ask students to discuss such letters during their designated office hours to protect the privacy of the student. For additional information see the Disability Services Office website at

<http://www.untDallas.edu/disability>. You may also contact them by phone at 972-338-1777; by email at UNTDdisability@untDallas.edu or at Building 2, room 204.

**Blackboard Learn Accessibility Statement:**

University of North Texas at Dallas is committed to ensuring its online and hybrid courses are usable by all students and faculty including those with disabilities. If you encounter any difficulties with technologies, please contact our ITSS Department. To better assist them, you would want to have the operating system, web browser and information on any assistive technology being used. Blackboard Learn course management system's accessibility statement is also provided: <http://www.blackboard.com/Platforms/Learn/Resources/Accessibility.aspx>

**NOTE:** Additional instructional technology tools, such as Turnitin, Respondus, Panopto, and publisher cartridge content (i.e. MyLab, Pearson, etc.) may NOT be fully ADA compliant. Please contact our Disability Office should you require additional assistance utilizing any of these tools.

**Course Evaluation Policy:**

Student's evaluations of teaching effectiveness is a requirement for all organized classes at UNT Dallas. This short survey will be made available to you at the end of the semester, providing you a chance to comment on how this class is taught. I am very interested in the feedback I get from students, as I work to continually improve my teaching. I consider students' evaluations to be an important part of your participation in this class.

**Assignment Policy:** (According to the instructor's discretion while working in concert with the division/program's guidelines).

**Exam Policy:** (Online exams and the ability to retake is solely at the instructor's discretion). **NOTE:** Online exams may be proctored on campus per instructor's discretion.

**Academic Integrity:**

Academic integrity is a hallmark of higher education. You are expected to abide by the University's code of Academic Integrity policy. Any person suspected of academic dishonesty (i.e., cheating or plagiarism) will be handled in accordance with the University's policies and procedures. Refer to the Student Code of Academic Integrity at

[http://www.untDallas.edu/sites/default/files/page\\_level2/pdf/policy/7.002%20Code%20of%20Academic\\_Integrity.pdf](http://www.untDallas.edu/sites/default/files/page_level2/pdf/policy/7.002%20Code%20of%20Academic_Integrity.pdf) for complete provisions of this code.

Academic dishonesty includes, but is not limited to, cheating, plagiarizing, fabrication of information or citations, facilitating acts of dishonesty by others, having unauthorized possession of examinations, submitting work of another person or work previously used without informing the instructor, or tampering with the academic work of other students.

**Web-based Plagiarism Detection:** Please be aware in some online or hybrid courses, students may be required to submit written assignments to Turnitin, a web-based plagiarism detection service, or another method. If submitting to Turnitin, please remove your title page and other personal information.

**Classroom Policies**

**Online Attendance and Participation:**

The University attendance policy is in effect for this course. Class attendance in the Blackboard classroom and participation is expected because the class is designed as a shared learning experience, and because essential information not in the textbook will be discussed in the discussion board. Online presence and participation in all class discussions is essential to the integration of course material and your ability to demonstrate proficiency. .

Attendance for this online or hybrid course is considered when you are logged in and active in Blackboard, i.e., posting assignments, taking quizzes, or completing Discussion Boards. To maintain financial aid award eligibility,

activity must occur before the census date of the session or term of the course. Refer to <http://www.untdallas.edu/registrar> for specific dates. If you are absent/not active in the course shell, it is YOUR responsibility to let the instructor know immediately, upon your return, the reason for your absence if it is to be excused. All instructors must follow university policy 7.005 covering excused absences; however, it is the instructor's discretion, as outlined in the course syllabus, of how unexcused absences may or may not count against successful completion of the course

**Inclement Weather and Online Classes:** Online classes may or may not be effected by campus closures due to inclement weather. Unless otherwise notified by your instructor via e-mail, online messaging, or online announcement, students should assume that assignments are due as scheduled.

**Online "Netiquette:**

In any social interaction, certain rules of etiquette are expected and contribute to more enjoyable and productive communication. Emails, Discussion Board messages and/or any other forms of written communication in the online environment should use proper "netiquette" (i.e., no writing in all caps (usually denotes yelling), no curse words, and no "flaming" messages (angry, personal attacks).

Racial, ethnic, or gender slurs will not be tolerated, nor will pornography of any kind.

Any violation of online netiquette may result in a loss of points or removal from the course and referral to the Dean of Students, including warnings and other sanctions in accordance with the University's policies and procedures. Refer to the Student Code of Student Rights Responsibilities and Conduct at <http://www.untdallas.edu/osa/policies>. Respect is a given principle in all online communication. Therefore, please be sure to proofread all of your written communication prior to submission.

**Diversity/Tolerance Policy:**

Students are encouraged to contribute their perspectives and insights to class discussions in the online environment. However, offensive & inappropriate language (swearing) and remarks offensive to others of particular nationalities, ethnic groups, sexual preferences, religious groups, genders, or other ascribed statuses will not be tolerated. Disruptions which violate the Code of Student Conduct will be referred to the Dean of Students as the instructor deems appropriate.

**Technology Requirements:** In order to successfully access the materials in an online or hybrid course, UNT Dallas advises that your computer be equipped with the minimum system requirements.

Blackboard Learn 9.1 is the platform software for this course. Blackboard Learn supports major web browsers such as Windows Internet Explorer, Apple Safari, Mozilla Firefox, and Google Chrome. However, since the latter two are updated continually, some recent versions may not be compatible. If you experience difficulty accessing or using components of the course, try using Internet Explorer. Also, no matter what browser you use, always enable pop-ups. For more information see:

- <http://www.untdallas.edu/dlit/ecampus/requirements>
- <https://blackboard.secure.force.com/publickbarticleview?id=kAB700000008Oom>
- [https://learn.unt.edu/bbcswebdav/institution/BrowserCheck/check\\_full.html](https://learn.unt.edu/bbcswebdav/institution/BrowserCheck/check_full.html)