**Fundraising & External Relations for Nonprofit Organizations**

**NAD 451– Fall 2010**

Maxine Goodman Levin College of Urban Affairs  
Cleveland State University

**Monday:** 6:00-9:50 PM  
**Start/End Dates:** August 30 – December 13, 2010  
**Location:** UR 243  
**Course:** NAD 451– 4 credit hours

**Instructor:** Janis Purdy  
216-851-8005  
jfpurdy@msn.com  
**Office Hours:** Before or after class; set by appointment via email.

**Course Description:**  
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. This course was formerly listed as USA 451. Students who have earned credit for USA 451 may not earn credit for NAD 451.


**Grading**  
Your grade will be a combination of your class participation and the quality of your work on the required assignments. You are expected to come to all of the classes and to do all of the reading. It will be impossible to master the information that you will be expected to use in the assignments if you do not. There will be no final exam but a class project that will require you to analyze the financial sustainability and fundraising methods of a local nonprofit organization. The class project will tie together all of the other assignments.

- **Participation** - 20% of your grade will be class participation, so please make sure you are in attendance or your grade will suffer accordingly. No electronic devices - breaks will be for that.

- **Assignments** - 50% of your grade will be based on the quality of your work on the required written exercises and assignments.
  - News Release Assignment - 1 page  
  - Foundation Center Visit - 4 pages  
  - IRS 990 Assignment - 1 page  
  - Case Statement - 3 pages  
  - Watchdog Critique and Analysis - 3 pages

- **Organizational Analysis** - 30% of your grade will be the final class project that will require you to analyze the financial sustainability of a local nonprofit organization and present orally.
  - Organizational Study Proposal - 1 page  
  - Final Report - 5 - 10 pages  
  - Presentation - 10 - 15 fifteen minutes
Class Schedule and Readings: (Note: All due dates and class topics are subject to change at the Instructor's discretion.)

August 30, 2010 – Class 1
Introductions
The Syllabus
Review Class Assignments
Confidentiality
The Assessment Tool
Nonprofit Fundraising Quiz

September 6, 2010 - Labor Day - No Class

September 13, 2010 – Class 2
Introductions; Review Syllabus and Class Assignments; Confidentiality Reminder
Topic: The Organizational Context
Preparation:
  Seltzer Sec. 1.1 Defining a Statement of Purpose
  Seltzer Sec. 1.2 Making an Organization Legal
  Seltzer Sec. 1.3 Building a Board of Directors
  www.independentsector.org - Panel on the Nonprofit Sector: Final Report

September 20, 2010 – Class 3
Topic: Financial Management Roles and Accountability
Preparation:
  Seltzer Sec. 1.3 Building a Board of Directors

September 27, 2010 – Class 4
Selected Organization: 1 Page Proposal Due
Topic: Planning: Strategic and Otherwise
Preparation:
  Seltzer Sec. 1.4 Putting Your Purpose to Work: Planning Your Programs
  Seltzer Sec. 1.5 Developing Budgets
  The Drucker Assessment Process - www.leadertoleader.org

October 4, 2010 – Class 5
News Release Assignment
Topic: External Relations
Preparation:
  Seltzer Sec. 2.6 The Many Sources of Funding
  Seltzer Part A.13 Raising Money on the Internet
  www.causecommunications.org

October 11, 2010 - Columbus Day - No Class

October 18, 2010 – Class 6
Foundation Center Assignment Due
Topic: Grant Programs
Preparation:
  Seltzer Part B. 15 - 21 Approaching Institutions for Support
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| October 25, 2010   | Class 7 | Topic: The Individual Donor                | IRS 990 Assignment Due.  
Preparation:  
Seltzer Part A.7 Giving from Individuals: An Overview  
Seltzer Part A.9 Direct Mail  
Seltzer Part A.10 Using the Telephone  
Seltzer Part A.11 Face to Face Solicitation  
Writing a Case Statement - various internet sources |
| November 1, 2010   | Class 8 | Topic: Major Gifts, Special Events, Planned Giving | Seltzer Part A.8 Special Events  
Seltzer Part A.12 Planned Giving |
| November 8, 2010   | Class 9 | Topic: Capital Campaigns                   | Various internet sources |
| November 15, 2010  | Class 10| Topic: Communications Tools                | Case Statement Assignment Due.  
Preparation:  
www.causecommunications.org  
Various internet sources |
| November 22, 2010  | Class 11| Topic: Ethics and the Development Profession | Watchdog Critique Assignment Due.  
Preparation:  
Watchdog news video  
Visit afp.org |
| November 29, 2010  | Class 12|                                            | Group 1 Final Reports and Presentations Due |
| December 6, 2010   | Class 13|                                            | Group 2 Final Reports and Presentations Due |
| December 13, 2010  |         |                                            | Finals Week – No Class |
Class Assignments

**News Release Assignment** - 1 page - Write a 1 page news release about your selected organization. You can make up the "news" but use proper news release format and clear language. Check out the many on-line resources that can help with this exercise!

**Foundation Center Visit** - 3-4 pages - 1422 Euclid Avenue, Suite 1600, Cleveland, OH 44115, Tel 216-861-1934 Visit the Foundation Center and locate at least three potential funders not currently, or recently, funders of your selected organization. If this information is not available on the organization's 990 or annual report, it should be available on the foundation's 990. Include a narrative that explains why you believe each funder is one that your selected organization should consider as a funder.

**IRS 990 Assignment** - 1 page - Form 990 is an annual reporting return that most federally tax-exempt organizations must file with the IRS. It provides information on the filing organization's mission, programs, and finances. Find the most recent 990 filed by your selected organization and write a one-page summary highlighting what you learned. Once again, check out the many on-line resources that can help with this exercise, especially at Guidestar or www.npccny.org/Form_990/990.htm.

**Case Statement** - 3 pages - Write a case statement for your selected organization using the principles discussed in class. Answer these questions:

- Who is the organization and what does it do? Why does it exist?
- What is distinctive about the organization?
- What must be accomplished?
- How will this campaign enable it to be accomplished?
- How can the donor become involved?
- What's in it for the donor? Why should they give to this effort?

**Watchdog Critique and Analysis** - 3 pages

Familiarize yourself with three "charity watchdog" organizations by studying their websites. Write a 3 page paper comparing them organization keeping in mind that the information provided is meant to help donors evaluate charities. See if your selected organization has been evaluated. Give thoughtful analysis of the usefulness of each to the prospective donor as well as its fairness to the charities being rated. Also, offer your opinion as to whether the criteria employed is useful in measuring the effectiveness and efficiency of the organizations in serving their missions. Do you think the existence of these charity watchdog organizations actually contribute to the accountability of nonprofit organizations?

**Organizational Analysis: Proposal, Report and Presentation**

The class project will be an organizational analysis of the funding strategies and tactics of a student-selected organization. The analysis and recommendations should be based upon the concepts and issues that have been studied in class and in the readings. The class project requires students to analyze the organization's funding in terms of sufficiency, stability, diversity, sustainability and opportunity using the concepts learned through mastery of the course work.

**Proposal**

Select a nonprofit organization in the area which you will analyze in your final project to be approved by the instructor. On 1 page, indicate the organization name, contact information and a brief explanation of your choice.

**Report** - The 5 - 10 page paper should include the student's recommendations for the strengthening of the organization's financial picture based upon what the student has learned in this course. The student should use the organization's 990's for at least the last three years, annual reports and other documents if available, and a conversation with a senior staff member to gain the necessary information about the organization.

**Presentation** - The class project will result in a ten to fifteen minute presentation followed by questions and answers by the other class members and the professor.