Course Syllabus

Instructor: Jason A. Huff, MBA, CFRE
(314) 471-5671 (mobile)
jhuff@wustl.edu

Class Dates/Times  Mondays 6:00-8:30 PM
January 12 – May 5, 2015
*Class will not be held Monday, January 19 (MLK Day)
*Class will not be held Monday, March 9 (Spring Break)
*Class will not be held in person March 30. Please check syllabus & Blackboard for readings & assignments due.

Place: Seigle Hall, Room 205

Availability: By Appointment

Course Summary
This course concentrates on effective fund raising management, accenting the practice, principles, processes, and programs of fund raising from the private sector. The ethical, theoretical, and practical contexts for fundraising and resource development will be discussed as well as contemporary resources to aid today’s fund raising professional. A comprehensive review and analysis is provided of annual and major gift programs (individual & corporate) together with planned giving and campaign strategies. Donor motivations and characteristics are also examined. The course includes individual and team participation and presentations. The final project will allow students to choose between (1) preparation of a 12-month fund raising plan for an organization of their choosing and instructor’s approval; or (2) an in-depth review of two development programs from different areas of the nonprofit sector (i.e. education, social services, arts & culture, etc.)

Course Objectives
The objective of this course is for students’ to gain insight and understanding of:

1. The role of fund raising within nonprofit organizations and a society as a whole.

2. The importance and strategies of organizational management and leadership to affect the highest level of fundraising success.

3. The best practices, major principles, concepts and strategies applied within the fundraising profession through readings, text materials, lectures, discussions, and individual and team projects.

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4. The various resources available for planning and implementing fundraising programs.

5. Recent trends and critical issues important to fundraising professionals and the nonprofit community.

6. Donor motivations and concerns in giving and to appreciate their role in the resource development process.

7. Resources and strategies for lifelong learning and professional development.

**Topics Not Covered In This Course**

It is the goal of the instructor to make this course as practical and relevant as possible for those enrolled. The course is intentionally designed to provide a broad overview of fundraising theory and practice. Nonetheless, not all aspects of fundraising can be addressed in the period of time allotted. The following topics may be briefly addressed, but will not be part of the core content of this class. The instructor will, however, support any student who wishes to explore these topics individually through the assignments and projects of the course.

1. Public funding (government support)
2. International fundraising
3. Grant writing (offered as a stand-alone course NPM 470)

**Course Activities**

Lecture, discussion, guest speakers, and individual and group activities will be the primary methods of instruction employed. Topics will include: the philosophy, ethics, and professional standards of fundraising; organizational readiness; development and strategic planning; case statements; donors and stewardship; board, volunteer, staff and client roles in fundraising; the annual fund; fundraising campaigns; planned giving programs; fundraising accountability and effectiveness; prospect research, and resources available to assist today’s fundraising professionals.

**Course Requirements**

1. Attend class and participate in exercises and discussions;
2. Complete assigned readings;
3. Complete class and individual projects and assignments;
4. Select and complete a final project from the two options presented:
   1) preparation of a 12-month fundraising plan for an organization; or
   2) an in-depth review of two development programs from different areas of the sector

**Course Grading**

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<thead>
<tr>
<th>Assignment</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Assignments</td>
<td>10%</td>
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<tr>
<td>Class Participation</td>
<td>15%</td>
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<tr>
<td>Final Exam</td>
<td>15%</td>
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<tr>
<td>Team Case Presentation</td>
<td>30%</td>
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<tr>
<td>Final Project</td>
<td>30%</td>
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<tr>
<td>TOTAL</td>
<td>100%</td>
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Jason A. Huff, MBA, CFRE

UPDATED 1/08/15
Course Textbooks, Resources and References*

Textbook: Sargeant, Adrian, Shang, Jen, and Associates; 
Fundraising Principles and Practice  
San Francisco, CA, Jossey- Bass, Publisher, 2010

Available in hardcover & e-book formats:  

Student companion website: www.studyfundraising.info

*Additional resources & references will be made available on the course Blackboard site

Attendance Policy
Students are expected to attend all class sessions. In the event that circumstances prevent attendance, students should notify the instructor via phone or email as early as possible. Students missing two or more class sessions should consult the instructor to determine whether a withdrawal from class is appropriate. Students are expected to obtain the materials discussed during the missed class session.

Make-up Assignments and Extra Credit
Students who miss a class session are asked to submit a written report (1-2 pages) on an article, blog or journal entry pertaining to fundraising. Up to three (3) reports can be submitted for additional credit (each report equals one (1) percentage point toward final grade).

Academic Integrity
Academic integrity is at the core of Washington University’s mission of research, teaching and learning. All students are expected to adhere to high standards of academic integrity. That means that all work presented as original must, in fact, be original, and the ideas and contributions of others must always be appropriately acknowledged. Violations of standard rules of academic integrity will be reported to the Dean and may lead to disciplinary action which could result in expulsion from the University.

Disability Resource Center
Washington University is committed to providing accommodations and/or services to students with documented disabilities. Students who are seeking support for a disability or a suspected disability should contact the Disability Resource Center (DRC) at 5-4062, drc@dosa.wustl.edu. The DRC is located in Gregg Hall. The DRC is responsible for approving and arranging all accommodations for University students. All information is treated as confidential.

Disclosure
This syllabus, course description, assignments and required readings may be modified at the sole discretion of the instructor. Students will be notified by the instructor of any such changes in a timely manner.

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UPDATED 1/08/15
Course Outline, Assignments and Required Readings

January 12, 2015: Class #1: Introduction to Philanthropy & Fundraising

- **Introductions**
- **Review of syllabus and major class projects & assignments**
- **Ethics: Donor Bill of Rights & Standards of Ethical Principles and Professional Practice**
- **Philanthropy / Fundraising History & Context**
- **Introductory Survey**
- **Blackboard Intro (optional)**

Reading Assignment for This Class (Sargeant): NONE

Assignment Due: NONE

January 19, 2015: NO CLASS – Martin Luther King, Jr. Holiday

January 26, 2015: Class #2 – A Fundraising and Resource Development Overview

Determine teams and organizations for case presentation.

Reading Assignment for This Class (Sargeant):
Chapter 2: The Development of a Profession (pp. 25-42);
Chapter 3: Ethical Fundraising (pp. 44-59).
Assignment Due: NONE

February 2, 2015: Class #3 – Organizational Readiness and Planning

*Case presentation team work time*

Reading Assignment for This Class (Sargeant):
Chapter 6: Fundraising Planning: The Fundraising Audit (pp. 115-144);
Chapter 7: Fundraising Planning (pp. 146 – 186).
Assignment Due: NONE

February 9, 2015: Class #4 – Developing a Case for Support

*Case presentation team work time*

Reading Assignment for This Class (Sargeant):
Chapter 4: Individual Giving Behavior (pp. 61-95);
Chapter 5: Social Influences on Giving (pp. 97-111);
Chapter 8: The Case for Support (pp. 188-198).
Assignment Due: Update (verbal) on team case presentation project to instructor.
February 16, 2015: Class #5 – Annual Giving
(President’s Day Holiday - Class WILL be held)
Case presentation team work time

Reading Assignment for This Class (Sargeant):
Chapter 10: Direct Response Fundraising (pp. 239-275);
Chapter 11: Fundraising Online: Techniques and Tools (pp. 276-310).
Assignment Due: NONE

February 23, 2015: Class #6 – Annual Giving (cont.)
Case presentation team work time; Choose presentation order

Reading Assignment for This Class (Sargeant):
Chapter 12: Donor Retention and Development (pp. 312-350).
Assignment Due: Sign up for FINAL project

March 2, 2015: Class #7 – Case Presentations

Reading Assignment for This Class: NONE
Assignment Due: NONE

March 9, 2015: No Class - SPRING BREAK (March 10-16)

March 16, 2015: Class #8 – Major Gifts (Part 1)

Reading Assignment for This Class (Sargeant):
Chapter 13: Major Gift Fundraising (pp. 351-375).
Assignment Due: NONE

March 23, 2015: Class #9 – Major Gifts (Part 2), Planned & Tribute Giving

Reading Assignment for This Class (Sargeant):
Chapter 14: Bequest, In Memoriam, and Tribute Giving (pp. 377-405);
Chapter 15: Planned Giving (pp.407-429)
Assignment Due: NONE

March 30, 2015: Class #10 – Donor Recognition & Stewardship (NO CLASS)
**Class will not be in session. However, students will be required to visit a non-profit organization to observe and document donor recognition strategies and submit a narrative (2 page minimum) outlining observations and reflections.

Reading Assignment for This Class: NONE
Assignment Due: NONE
April 6, 2015: Class #11: Corporate Giving & Fundraising

Reading Assignment for This Class (Sargeant):
Chapter 16: Corporate Giving and Fundraising (pp. 431-459)
Assignment Due: Donor Recognition Project

April 13, 2015: Class #12 - Program Evaluation & Analysis
Discuss questions for Fundraising Roundtable in two weeks

Reading Assignment for This Class (Sargeant):
Chapter 9: Assessing Fundraising Performance (pp. 200-233)
Assignments Due: (1) Verbal report to instructor on Final Project progress. (2) Submit questions for Fundraising Roundtable next week.

April 20, 2015: Class #13 – Fundraising Volunteers; Fundraising Events

Reading Assignment for This Class (Sargeant):
Chapter 18: Managing Fundraising Volunteers (pp. 489-516);
Chapter 19: Fundraising Events (pp. 519-538).
Assignment Due – (1) Report to instructor on Final Project progress (Final Project due next week!)

April 27, 2015: Class #14 - Fundraising Roundtable and Reception!
A panel of fundraising professional from various areas of the sector share their stories and answer your questions.

Reading Assignment for This Class (Sargeant):
Chapter 20: Women and Philanthropy (pp. 540-558)
Chapter 21: Public Trust and Confidence (pp. 560-580)
Assignment Due - Final Project due.

May 4, 2015: Class #16 – FINAL EXAM

Reading Assignment for This Class (Sargeant): Review for final.
Assignments Due: NONE

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