

# MBA 780 – Strategic Issues in Philanthropy Syllabus

April-June 2010

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Hours: On appointment

## Course Description

This course provides an overview of the strategic issues experienced by three group perspectives in the nonprofit business environment: 1) professionals who operate the business, 2) supporters with philanthropic intent to support the nonprofit mission, and 3) the clients served by the mission. In conjunction, a simultaneous solicitation practicum provides a “hands on” experience with the necessary tools & tactics to identify, cultivate, solicit and steward prospective donors.

<b>General Session Agenda:</b>	5:30pm	Pre-Session Arrival, Setup student appointment requests
	5:45-6:15pm	Group review of Homework, Instructor Feedback
	6:15-6:45pm	Guest of the Day, Resource of the Day
	6:45-7:00pm	Break 1
	7:00-8:00pm	Issues Session Topic Material – Part 1
	8:00-8:15pm	Break 2
	8:15-8:45pm	Issues Session Topic Material – Part 2
	8:45-9:15pm	Session Review, Homework Assignment(s)

## Course Objectives

- Apply and compare models, tools, and benchmarks found in the academic field of professional fundraising and fundraising research that are foundational to achieving nonprofit business philanthropic results
- Demonstrate recurring management issues experiences by professionals, supporters, and clients served by nonprofit businesses and traditional versus contemporary resolutions to achieve philanthropic results
- Describe the practices and differences found in international nonprofit business environments
- Coursework will emphasis ethical complexities and career plan options to create meaningful career path decisions
- Discuss current events and emerging trends with a particular focus on Hawaii nonprofit business

## Required Course Text/Resources

Major Donors – Finding Big Gifts in Your Database and Online by Ted Hart, James M. Greenfield, Pamela M. Gignac, and Christopher Carnie, 1<sup>st</sup> edition, John Wiley & Sons, ISBN-13: 978-0-471-76810-4

## Course Expectations and Policies

This is a graduate seminar class. The highest caliber of writing, presentation, class interaction, and delivery of work is expected. Preparation and active participation per session is a requirement. See grading & assignment sections below.

## Class Presenters and Visitors

Depending upon schedules and acceptance, current professionals in the industry will speak to the class to share perspectives and insights. Students are expected to engage the professionals with questions and discussion that apply the course material and treat the presenters and visitors with the highest level of professionalism.

## Assessment/Grading

Your final grade is based on 100 points through weekly assignments & participation and a final exam. Final grades are determined by: 90-100points = A, 80-89points = B, 70-79points = C, 69 or lower fails the course

	Per Week:	1	2	3	4	5	6	7	8	9	10	% Total	Point Total
<b>Assignments</b>	5 or 0 points	5	5	5	5	5	5	5	5	5	5	50	0-50
<b>Participation</b>	2 or 0 points, *Extra Credit = 1 point, max 5	2	3*	2	3*	2	3*	2	3*	2	3*	25	0-25
<b>Final Exam</b>	0-25	-	-	-	-	-	-	-	-	-	25	25	0-25
	<b>Total</b>	<b>7</b>	<b>8</b>	<b>7</b>	<b>8</b>	<b>7</b>	<b>8</b>	<b>7</b>	<b>8</b>	<b>7</b>	<b>33</b>	<b>100</b>	<b>100</b>

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## **Weekly Assignments (Individual): -- (50%)**

Assignments are due the TUESDAY after the class by 6:00pm and MUST be emailed in pdf format with the student's name, date, class #, homework session #, and assignment summary in the top right hand header of ALL PAGES of the document. Student work will be shared with classmates for analysis and feedback and must show improvement over the course period. Students are responsible for bringing copies of all classmate assignments to return written comments. Assignments will be evaluated (5 or 0 points) on meeting the assignment deadline, required format, completion of assigned task, and writing quality (on topic, concise, neat, exhibits personal expression & comprehension of concepts). Assignments must demonstrate mastery of the reading and presentation material and in class concepts as well as critical thinking of how to apply information learned. Reading assignments are listed in the assignment schedule.

## **Participation Evaluation – (25%)**

Weekly participation will be evaluated (2 or 0 points) occurrence of input, questioning, and discussion each week to provide integrated learning and insights in addition to the extent of the instructor's knowledge. Involving and engaging classmates in discussion, sharing articles, resources, non-class materials, and providing individualized feedback are elements of the evaluation process for this grade portion.

## **Final Exam/Case Analysis & Presentation – (25%)**

Each student will turn in a final exam presentation in week and provide a final PowerPoint presentation to classmates and guests summarizing the strategic issues involved from course content, challenges, and the suggested resolution path. Completion of the final exam is necessary to pass the course.

## **Assignment Schedule & Result Focus**

The following reading and assignment work is required before each class.

### **4/8 Issues Session 1 – Knowing the Foundational Models, Prospecting Major Gifts**

Chapter 1. *Know the 4 Business Types, 4 Functions of Fundraising, Differentiate Nonprofit/Forprofit Roles*

Practicum-Leading: Choose your mission, Establish key contact, Finalize ask amount.

Result: Gain approval to support in writing from primary approval source.

### **4/15 Issues Session 2 - Knowledge Management, Data Mining, and Prospect Screening**

Chapter 2. *Know Pyramid of Giving Model, Differences in Annual-Major-Planned Giving Programs, Guidestar*

Practicum-Prospecting: Memorize mission. Research & identify donation results. Define types of prospects.

Result: Know what supporting, read 990, and how support to be used. Define 15 pre-qualified prospect groups.

Extra Credit Assignment: TBA

### **4/22 Issues Session 3 - Isolating & Qualification of Prospects**

Chapter 3. *Know 3 A's: Ability (Capacity), Attachment (Interest), Affinity (Timing)*

Practicum-Qualification: Define Preliminary Plan (Deadline, Package, Approach, Help Needed, What you know/don't know. Draft and collect all documents/materials to be used.

Result: Qualify prospect and match to materials to develop a specific approach. Review approach with contact.

### **4/29 Issues Session 4 – Prospect Research Policy, Privacy and Ethics**

Chapter 4. Print/Read -AFP Standards of Practice, Fed: IRS Publication 557, and 598 (tax unrelated biz income) HI: Form 98-3 Tax Issues for HI Nonprofits, Form G-6 Ap for exemption from payment of GET.

Practicum-Cultivation Prep: Finalize meeting time/date & materials to be used.

Result: Confirm meeting time to make the ask. Print/read copy of the gift acceptance policy.

Extra Credit Assignment: TBA

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## **5/6 Issues Session 5 – U.S. Canadian, Europe & Asia: International Strategies**

Chapter 5 and 6: Know Key Differences in International strategies. Acquire a sample Gift Acceptance Policy.

Practicum–Cultivation Prep: Catch up week to train “ask” supporter & insure meeting is prepared

Result: Get on track to insure solicitation is effective and professional

### INSTRUCTOR MID-SESSION EVALUATION\*

## **5/13 Issues Session 6 – Website: What does it say, Internet for Donor Fundraising**

Chapter 7 and 8. Familiar with online donation tools, review Facebook/Twitter Campaign features

Practicum–The Package & Pitch: Present materials and make the “ask”

Results: Achieve the first professional “ask”. If additional request or proposal is needed, provide post meeting.

Extra Credit Assignment: TBA

## **5/20 Issues Session 7 – Effective Use of Information within Staff/Volunteer Teams**

Chapter 9 and 10. Be familiar with Board versus Program Volunteer issues. Memorize Job description areas.

Practicum–Revisions: Follow up to initial ask. Review with Org point of contact to insure accurate/appropriate.

Results: Re-customized Ask to gain a definitive yes or no by a specific deadline.

## **5/27 Issues Session 8 – Results Analysis & Performance Measurements & tomorrow’s Challenges**

Chapter 11 and 12. Know Cohort vs. Financial Performance Metrics. Design sample report “dash board”.

Practicum–Gift Commitment: Perform follow up as necessary to gain a gift commitment response.

Results: Yes/No Answer from Qualified Prospect. Finalized Gift Agreement for Signature.

Extra Credit Assignment: TBA

## **6/3 Final Session: Review of Class, Final exam handed out.**

Final Exam handed out. Required to be returned email & in pdf format by deadline.

Practicum–Stewardship, the Post Ask Follow up: Whether donation or no donation, follow up as appropriate.

Results: Thank you letters and meeting report to nonprofit sent or gift agreement signed & returned

Final Extra Credit Assignment: TBA

## **6/10 Final Exam Week**

Final Exam & Practicum Presentations. Order of presentation is established randomly.

Practicum– Final Learning Summary: Provide a two page report summarizing your experience emphasizing improvements to address for the next solicitation experience.

### \*INSTRUCTOR MID-SESSION EVALUATION

- Are the course objectives clearly stated?
- Is the class time used productively?
- Is the instructor consistently prepared for class sessions?
- Are the academic requirements for this course challenging?
- Does the instructor demonstrate knowledge of the subject?
- Is the overall quality of the instructors teaching high?
- Are you gaining a significant amount of knowledge from this course?
- Overall, do you feel this is a good course?
- I would recommend this course to another student?