

Chaminade University MBA Program

MBA 764: Strategic Issues in Philanthropy

Course Schedule

Quarter:	Summer 2016
Meeting days and times:	Hybrid -Online and Classroom Classroom: Thursdays -5:45 pm - July 7, July 21, August 4, August 18, and September 8, 2016 Online: July 14, July 28, August 11, August 25 and September 1, 2016
Course location:	K31and Online

Instructor Contact Information

Course Instructor:	John Ciambrone, M.Ed., CFRE
Office:	None
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Course Description

Examines planning and development of funding acquisition and use of not-for-profit organizations. Enables students to construct funding strategies to improve organizational performance, solicit support from donors, and demonstrate effectiveness to key stakeholders. Topics include organizational planning, donor-centered fundraising, management of campaigns, managing information, and professional ethics in philanthropy.

Course Objectives & Learning Outcomes

- Demonstrate issues & provide a practicum experience with recurring management issues experienced by professionals, supporters, and clients served by nonprofit businesses and the traditional & contemporary resolutions to achieve philanthropic results.

- 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
- Understand ethical complexities and nonprofit career plan options to create meaningful vocational path decisions through coursework materials & experiences
- Discuss current events and emerging trends focusing on Hawaii's nonprofit business environment

Course Schedule and Topics

General Session Agenda:

5:30pm Pre-Session Arrival, Setup student appointment requests

5:45-6:15pm Group review of Homework, Instructor Feedback

6:15-6:45pm Resource & Principle(s) of the Day

6:45-7:00pm Break 1

7:00-8:00pm Issues Session Topic Material Part 1 - Reading Materials

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)

Date	Issue Topic	Prep Reading	Assignments for next class	Outcome Desired
7/7 Classroom	The Power of Planning, Context of Philanthropy, values based approach, developing a plan	Introduction & Chapter 10, 1, 2, & 3 in Beyond Fundraising	Leading: Choose your nonprofit and begin to research mission, 990, fundraising activities. Report findings at 8/4 classroom session	Basic understanding of a culture of philanthropy within a nonprofit, staying on mission, and the importance of both to fundraising
7/14 Online	Ethics in Fundraising: The Appearance of Impropriety and the Rights of Donors	Read Chapters 1, 2, & 3 in Nonprofit Fundraising Strategy	Pick one case study from chapter 2 and one case from Chapter 3 and background provide your own thoughts and insights. Without using names, have you ever experienced or heard of situations shared in the book, what were the outcomes. Must be completed by 7/14	Provide guidance and standards for making ethical choices and decisions within your own organization

7/21 Class-room	Capitalizing on the Community's Investment: Annual & Capital Campaigns	Chapters 6 & 7 in Beyond Fundraising	Research: draft presentation on the organization you are supporting, read 990. Confirm how your donation will be used to the extent that you could solicit someone's support for it. Look for gift acceptance policies. Development of financial development plan.	Know the Pyramid of Giving Model, Differences in Annual-Major-Planned Giving Programs, Guide star, Prospecting: Know the mission. Research & identify donation results. Define types of prospects. Wealth screening tools.
7/28 Online	Public Privacy: exploring issues of privacy & fundraising & tainted money	Read Chapters 4 & 5 in Nonprofit Fundraising Strategy	Review Cases on page 62 and page 90 and provide your own thoughts, feedback, & experiences if any. Must be completed by 7/28	With so much of our information online in today's world where do we draw the line and protect the privacy of those we serve and ethical decisions on where we receive gifts. Gift acceptance policies within your organization.
8/4 Class-room	Individual presentation on your organization, mission, fundraising, needs, financial development plan etc. (25% of grade) Beginning to examine the solicitation process.	Read Chapters 4, 5, & 8 in Beyond Fundraising	Begin to develop a moves management program for a donor within your organization beginning with identification, and then assessing capacity, interest, and access, creating a cultivation program if needed, and stewardship once gift is completed.	Ability to identify, cultivate, and solicit potential donors. Know CIA: Capacity, Interest, and Access. Understanding the difference of investment in an organization compared to the tin cup approach.
8/11 Online	Compensation for development professionals and using donations as intended	Read Chapters 6 & 7 in Non-profit Fundraising Strategies	Choose one of the case studies from Chapter 6 and one from Chapter 7 and provide your thoughts, feedback, and real life experiences with any of those situations. Must be completed by 8/11	Understanding appropriate forms of compensation for development professionals. Ensuring we are using donations as intended to maintain the trust of the donor and integrity of the organization.
8/18 Class-room	Maximizing Board development and participation. Implementing the principles of Beyond Fundraising	Read Chapters 9, 11& 12 in Beyond Fundraising.	Draft of your solicitation plan, q & a on issues related to your plan, work still needed to complete your report for presentation on 9/8	Understanding it's not just the staff within the organization responsible for fundraising but volunteers play a key role. And beyond fundraising is beyond just theory. What's it take to implement and move an organization to a higher level of fundraising.
8/25 Online	Ethical considerations of making the ask	Read Chapter 8 and any other chapter of your choice in Nonprofit Fundraising	Pick one of the case studies in Chapter 8 and provide your thoughts, feedback, & any real life experiences. Pick one other chapter in Nonprofit Fundraising Strategies we have	Honesty, Integrity, respect, empathy, and transparency is paramount in all we do within our organizations but especially with our donors.

		Strategies	not read and provide a brief review for your classmates. Must be completed by 8/25.	
9/1 Online	Ethical considerations of making the ask	Read Chapter 8 and any other chapter of your choice in Nonprofit Fundraising Strategies	Pick one of the case studies in Chapter 8 and provide your thoughts, feedback, & any real life experiences. Pick one other chapter in Nonprofit Fundraising Strategies we have not read and provide a brief review for your classmates. Must be completed by 9/1.	Honesty, Integrity, respect, empathy, and transparency is paramount in all we do within our organizations but especially with our donors.
9/8 Class-room	Making the ask presentation (25% of grade)		Each student will share their moves management plan and solicitation process for their organization.	Know the process for identifying, cultivating, soliciting, and stewarding donors.

Required Course Text/Resources

- *Beyond Fundraising: New Strategies for Nonprofit Innovation and Investment*, Kay Sprinkel Grace, 2nd edition, John Wiley & Sons, ISBN-13: 978-0-471-70713-4
- *Nonprofit Fundraising Strategy: A Guide to Ethical Decision Making and Regulation for Nonprofit Organizations*, Janice Gow Pettey, John Wiley & Sons, ISBN: 978-1-118-48757-0

Assignments and Participation

Online Assignments (Individual) -- (30%) – As outlined above.

Participation Evaluation (Group) -- (20%) Participation will be evaluated by in-class attendance, and occurrence of input, questioning, and discussion each week involving and engaging classmates in discussion. Homework is necessary each week to support participation. Based on only 5 classroom sessions, all are mandatory but recognizing that issues arise from time to time if a student misses a class arrangements can be made for a make-up assignment. Students who miss 3 classes will not pass the course. Please notify instructor in advance of an absence if possible.

Organizational Development Plan & Solicitation Plan Presentation -- (50%) Each student will turn in an organizational development plan addressing the financial development needs of their organization and design a case and solicitation process to share with classmates addressing the strategic issues involved from practicum & course materials.

Assessment and Grading

Grading Scale:

Individual grade totals will be computed at the end of the semester based on the following Chaminade University of Honolulu grading scale.

A	90%-100%
B	80%-89.99%
C	65%-79.99%
F	Below 65%

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. Work should reflect what a professional would turn in to communicate in the real business environment.

Academic Honesty

Students are responsible for promoting academic honesty at Chaminade by not participating in any act of dishonesty and by reporting any incidence of dishonesty to an instructor or to a University official. Academic dishonesty may include theft of records or examinations, alteration of grades, and plagiarism. Questions of academic dishonesty in a particular class are first reviewed by the instructor, who must make a report with recommendation to the Business School Dean. Consequences for academic dishonesty may range from an "F" grade for the work in question to an "F" grade for the course to suspension or dismissal from the University.

Students with Disabilities

Chaminade University provides reasonable accommodations for individuals with a disability in compliance with the Americans with Disabilities Act (ADA) of 1990. If you would like to know if you qualify for ADA accommodations, please contact our Counseling Center at 808-735-4845. Current appropriate documentation will be required for determination of accommodation eligibility.

Characteristics of a Marianist Education

The following are characteristics of the approach to education engaged at Marianist schools, including Chaminade University:

- Educate for formation in faith
- Provide an integral quality education

- Educate in family spirit
- Educate for service, justice and peace
- Educate for adaptation and change

Instructor Background Information

John Ciambrone has over 35 years of experience in nonprofit management and fund development. Currently he is Senior Vice President and Regional Director for Netzel Grigsby Associates. Established in 1985, NETZEL GRIGSBY ASSOCIATES is a leading management and consulting firm specializing in fundraising and organizational development with not-for-profit organizations.

As a member of NETZEL GRIGSBY ASSOCIATES' California Central Coast region, John partnered with a wide variety of nonprofits ranging from educational and religious institutions to health care, human service and youth organizations, and guided them to achieve their goals. Clients have included Marian Regional Medical Center Foundation, French Hospital Medical Center Foundation, Museum of Ventura County, Santa Barbara Neighborhood Clinics, Santa Barbara Botanic Garden, La Casa de Maria Retreat & Conference Center, Boys & Girls Club of Santa Barbara, Girl Scouts of the Central Coast, First Presbyterian Church of Santa Barbara, Santa Barbara City College, and Lompoc District Public Libraries.

Prior to joining NETZEL GRIGSBY ASSOCIATES, John served as president and CEO of the Channel Islands YMCA in Santa Barbara, where he provided leadership for three separate capital campaigns which collectively raised \$14.6 million. During the same time period, annual fundraising increased by 78% to \$1.3 million.

Since moving to Hawaii in 2012, John has been active in AFP Aloha Chapter serving on the board and as Vice President of Education and currently is serving as the Chapter's director.

Guidelines for Communication

Netiquette

All members of the class are expected to follow rules of common courtesy in all email messages, threaded discussions, and chats.

Email:

Use your Chaminade email account.

Always include a subject line.

Remember that without others being able to see your facial expressions or hear your tone, some comments may be taken in a way you didn't intend. So be careful in wording your emails. Use of emoticons may be helpful in some cases.

Use standard fonts.

Special formatting such as centering, audio messages, tables, html, etc. should be avoided unless necessary to complete an assignment or other communication.

Threaded Discussion and Summaries for Online weeks only!

You must make three threaded discussion entries throughout the online week. You should post your first DQ response thread by Tuesday of the designated week, and by Thursday you must respond to at least two classmates DQ response threads.

Discussion Groups: (examples of discussion group protocol items; you may modify for your course)

Review discussion threads thoroughly before entering the discussion.

Maintain threads by using the “reply” button rather than starting a new topic.

Be respectful of others’ ideas.

Read the comments of others thoroughly before entering your remarks.

Cooperate with group leaders in completing assigned tasks.

Be positive and constructive in group discussions.

Respond in a thoughtful and timely manner.

Substantive Interaction

A brief note on substantive interaction: Substantive interaction can be seen when you respond to a posted note with a question. It advances a conversation about your query or quest. The interaction of fellow students in your classroom is enhanced, imagination is fired, and creative thinking released just by your posting of the question. The word substantive, itself, as it is used here at CUH, means "things having substance" interpreted as "things of quality, weight, importance, matter, and/or value". Substantive responses tend to move a conversation forward and promote the learning environment of the forum underway.

Examples of substantive responses include:

- A question is substantive (as stated above). Questions cause people to want to answer.
- Disagreement (phrased in a non-judgmental, positive tone) is substantive. Few statements can stir thinking as can opposite opinions on a topic. Disagreement phrased in a negative tone can slow or stop a conversation, so be careful to phrase disagreement so that it is not argumentative, but is thought provoking.
- Explanations are substantive. They provide information, and answer unasked questions.

- Quotations (with proper references to their context) are substantive. These, too, provide information.
- Suggestions are thought provoking, and in this way, substantive. Again, tone is important.
- Agreement is very substantive. As more and more people agree on an idea or statement, other people who may have disagreed at first may reconsider their former opinion, and sometimes learn a point of view previously overlooked.

Library

If you need additional resources: (www.chaminade.edu/library)

Technical Support

For technical questions contact the Chaminade eCollege help desk at helpdesk@chaminade.ecollege.com, or call toll free at 866-647-0654.

eCollege Account Support

For eCollege account support email jnakason@chaminade.edu or call 808-739-8327.

Course Website Address

<http://chaminade.ecollege.com>