Chaminade University
MBA Program

MBA 764: Strategic Issues in Philanthropy

Course Schedule Hybrid

Quarter: Summer 2024

Meeting days and times: **In person** -Thursday, July 11, Thursday, July 25, Thursday, August 8, Thursday, August 22, and Thursday, September 5, 2024 – 5:45 pm.

Threaded Discussion assignments the weeks of July 18, August 1, August 15, August 29, September 5, 2024.

Room: Kieffer Hall 9

Instructor Contact Information

Course Instructor: John Ciambrone, M.Ed., CFRE

Office: None

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Course Description

MBA 764 STRATEGIC ISSUES IN PHILANTHROPY: Examines the strategic issues in philanthropy through research and analysis of a local non-profit organization's programs and fundraising activities. Students will learn the fundamentals of fundraising enabling them to construct funding strategies to improve organizational performance, solicit support from donors, and demonstrate effectiveness to key stakeholders. Topics include donor-centered fundraising, management of campaigns, marketing, and public relations in philanthropic ventures, managing information, and professional ethics in philanthropy.

 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.

Date & Time	Issue Topic	Prep Reading	Assignments	Outcome Desired
7/11/24 In person	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.	Basic understanding of a culture of philanthropy within a nonprofit, staying on mission, and the importance of both to fundraising
Week of 7/18/24 Threaded Discussion	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 Tuesday 7/23/24**	Provide guidance and standards for making ethical choices and decisions within your own organization.
7/25/24 In person	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.
Week of 8/1/24 Threaded Discussion	Compensation for development professionals and using donations as intended	Read Chapters 4 & 5 in Non-profit Fundraising Strategies	Choose one of the case studies from Chapter 4 and one from Chapter 5 and provide your thoughts, feedback, and real-life experiences with any of those situations. **Must be completed by Tuesday 8/6/24**	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.

8/8/24 In person	**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.
8/15/24 Threaded Discussion	Ethical considerations of making the ask	Read Chapters 6 & 7 and any in Nonprofit Fundraising Strategies	Pick one of the case studies in Chapter 6 & chapter7 and provide your thoughts, feedback, & any real-life experiences. **Must be completed by Tuesday 8/20/24.**	Honesty, Integrity, respect, empathy, and transparency is paramount in all we do within our organizations but especially with our donors.
8/22/24 In person	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.	Understanding it is 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 takes to implement and move an organization to a higher level of fundraising.
8/29/24 Threaded Discussion	Ethical considerations of making the ask	Read Chapters 8 & 9 and in Nonprofit Fundraising Strategies	Pick one of the case studies in Chapter 8, Chapter 9 and Chapter 10 provide your thoughts, feedback, & any real-life experiences. **Must be completed by Tuesday 9/3/24.**	Honesty, Integrity, respect, empathy, and transparency is paramount in all we do within our organizations but especially with our donors.
9/5/24 In person	**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

Books can be purchased online through Amazon.com either new or used or through the CUH Bookstore online.

Assignments and Participation

Online Assignments (Individual) -- (30%) – As outlined above. Completing assignments late will result in point deductions.

Participation Evaluation (Group) -- (20%) Participation will be evaluated by attendance and occurrence of input, questioning, and discussion during our in-person sessions.

Organizational Presentation & Solicitation Plan Presentation -- (25% each) Individual presentation on your non-profit organization, mission, programs and impact on the community, fundraising needs, financial development plan etc. Each student will design a case and solicitation process to role play with classmates addressing the strategic issues involved from practicum & course materials. Completing assignments late will result in point deductions.

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 Marianst 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 is 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. Since moving to Hawaii in 2012, John has worked with a number of local nonprofits including the YMCA of Honolulu, Parker School, Hawaii Preparatory Academy, The Salvation Army, and Island Pacific Academy.

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.

John has been active in AFP Aloha Chapter, Association of Fundraising Professionals and HANO, Hawaii Association of Nonprofits and is recognized as a CFRE, Certified Fundraising Executive.

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 writing 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 response thread by Monday of the designated week, and by Friday you must respond to at least two classmates' 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.

Technical Support

Library
Provide a link to the Chaminade library (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.
Course Website Address
http://chaminade.ecollege.com