COURSE

Number/Title: SPEA-N557 Proposal Development and Grant Administration
Class Number: 11089
Day and Time; Location: 8-week online course, August 26 – October 18, 2024

PRE-CLASS START REQUIREMENTS:
- **Be prepared with a nonprofit organization to work with to develop course assignments.**
- Read first week's readings prior to class start.

INSTRUCTOR

Instructor: Helen Tygret, MPA
Office Hours/Location: Phone meetings by appointment. Please use email to set up a meeting.
Telephone: (843) 338-1762
E-mail Address: htygret@iu.edu

COURSE DESCRIPTION

This course provides the opportunity for each student to develop a complete project and proposal through participation in the entire grant application process. The integration of case studies, visual media, printed materials, and class discussions provides students with practical knowledge for writing successful proposals.

REQUIRED COURSE MATERIALS

Purchase options below (not at Bookstore). All three books are required reading and have been used in some form by Indiana University since 1998 and are used by other IU faculty and universities.

  i. The Nonprofit Grant Guidebook. Jamie D. Levy, ©2009, updated 2020. Successive editions used since 1998 by Indiana University. Available as PDF eBook from JDLA and hardcopy from Amazon.

  ii. The Nonprofit Grant Guidebook Proposal Toolkit. Jamie D. Levy, updated 2020. Available as PDF eBook from JDLA and hardcopy from Amazon.

  iii. Philanthropic Sustainability Handbook. Jamie D. Levy, Copyright 2009. Published by JDLevy & Associates. Available as PDF eBook from JDLA only. NOT available on Amazon - another book with similar name on Amazon is NOT the correct book for this course.

Option 1: Cost is $40 for all three books electronically as PDF eBooks. See order info below for eBooks.
Option 2: Cost is $54.98 total to purchase Nonprofit Grant Guidebook ($26.99) and Nonprofit Grant Proposal Toolkit ($17.99) in hardcopy on Amazon. Cost is $10 to purchase the Philanthropic Sustainability Handbook as PDF eBook. See order info below for eBooks.

	Nonprofit Grant Guidebook	Nonprofit Grant Guidebook Proposal Toolkit	Philanthropic Sustainability Handbook (NOT on Amazon)	Total Cost
Option 1	Order all three e-books in a discounted textbook bundle here.			$40.00
Option 2	Hardcopy Amazon $26.99	Hardcopy Amazon $17.99	PDF ebook JDLA $12.00	$56.98

Additional Course Readings: Required additional readings for each week are posted in the Canvas module for the week.

RECOMMENDED READINGS

You may find the following additional resources useful. This list is provided for your reference only and is not required.

Foundation Center website. www.foundationcenter.org.
>   Extensive resource on foundations and grantsmanship. Offers research, resources, and Foundation Directory Online.

U.S.A. Federal Government Grants website. www.grants.gov.
>   Complete source to search and apply for federal grant funds.

Bauer, David G. *The "How To" Grants Manual*. 7th Ed. Phoenix, AZ.: Oryx Press, 2011.
>   Designed to give increased insight into the competitive grants marketplace. Contains systematic approaches to organizing proposal efforts and tips on projecting a professional image to funding sources.

Bauer, David G. *Successful Grants Program Management*. San Francisco, CA: Jossey-Bass, Inc., 1999.
>   This book takes the mystery out of district-level grantseeking, helps prevent potential pitfalls, and provides expert advice on proven methods.

Clarke, Cheryl. *Storytelling for Grantseekers: a guide to creative nonprofit fundraising*. San Francisco, CA: Jossey-Bass, 2009.
>   Lots of good examples for reference.

Ferguson, Jacqueline. *The Grantseeker's Guide to Project Evaluation*. 2nd Ed. Gaithersburg, MD: Aspen Publishers, Inc., 1999.
>   Step-by-step strategies for evaluating grant-funded projects, along with instructions, examples, and statistical formulas to help collect and analyze evaluation information. Includes sampling methods, how to write an evaluation report, and much more.

Geever, Jane C. *The Foundation Center's Guide to Proposal Writing.* 6th Ed. New York, NY: Foundation Center, 2012.
>   Detailed instructions on preparing successful grant proposals as well as insights directly from interviews with 40 grantmakers from across the nation.

Hoefer, Richard. *Funded! Successful Grantwriting for Your Nonprofit*. New York, NY: Oxford University Press, 2017.
>   Geared toward person interested in becoming professional proposal development writer.

Karsh, Ellen and Arlen Sue Fox. *The only Grantwriting Book You'll Ever Need.* 4th Ed. New York, NY: 2014.
>   Helpful sections relevant to running a successful grantsmanship program outside of writing the actual proposal, such as how to lead meetings to get needed info, etc.

Margolin, Judith B. (Ed.). *After the Grant: The Nonprofit's Guide to Good Stewardship.* New York, NY: The Foundation Center, 2010.
> Advice from fundraisers and foundation staff on how to manage, communicate, and report on funded programs.

Margolin, Judith B. (Ed.). *The Grantseeker's Guide to Winning Proposals.* New York, NY: The Foundation Center, 2008.
> Collection of 35 proposals printed in their entirety with critiques from the grantmakers who awarded funding.

Orosz, Joel J. *The Insider's Guide to Grantmaking: How Foundations Find, Fund, and Manage Effective Programs*. San Francisco, CA: Jossey-Bass, Inc., 2000.
> Written for program officers and of considerable value to grantseekers, this book is a guide to making foundation grants and developing essential skills for effective and ethical grantmaking.

Payne, Mary Ann. *Grant Writing Demystified.* New York, NY: McGraw-Hill, 2011.
> Easy-to-follow guide with useful tips and forms.

Quick, James Aaron. *Grant Winner's Toolkit: Project Management and Evaluation*. New York, NY: John Wiley & Sons, Inc., 2000.
> Covering the key topics to secure future grants, this book helps nonprofits make sure that they have responded to the priorities of the grant maker, those they serve, and their organization and its mission.

Quick, James Aaron, and Cheryl Carter New. *Grantseeker's Budget Toolkit*. New York, NY: John Wiley & Sons, Inc., 2001.
> Step-by-step guidance, insider tips, and all the tools you need to create budgets and financial plans that win grants.

Ramsey, Leslie A., and Phale D. Hale, Jr. *Winning Federal Grants: A Guide to the Government's Grant-Making Process*. Gaithersburg, MD: Aspen Publishers, Inc., 1997.
> This book will inform and guide you to an understanding of how the federal government funds projects. Includes practical tools to help win more grants that includes copies of standard federal grant application forms, along with a glossary of federal grant terms and much more.

Zinsser, William. *On Writing Well: The Classic Guide to Writing Nonfiction.* New York, NY: Harper Perennial, 2016.
> This book focuses on the fundamentals of writing compelling nonfiction. While not specific to proposal development, the first several chapters will benefit anyone who desires to write compelling proposals.

COURSE LEARNING OBJECTIVES

Upon completion of this course, a student will:
- ✓ Incorporate principles of sustainable fundraising and relationship development to determine appropriate approach and stewardship strategies for the grantsmanship program
- ✓ Develop a project responsive to community needs, including using online and other resources to research for data that can document community needs
- ✓ Write concise, compelling and grammatically correct case expressions for a nonprofit organization (such as a proposal need statement)
- ✓ Assimilate various organizational materials, written case expressions, and other relevant information into a cohesive, comprehensive, competitive proposal package that could be submitted to a potential foundation or other investor
- ✓ Apply principles of fundraising ethics to real-world scenarios in the grantsmanship and administration process
- ✓ Assess the effectiveness of proposals considering the importance multiple factors play in

influencing a grantmaker's decision to award funding, particularly in an environment of numerous proposals and limited cash
- ✓ Prioritize multiple responsibilities such as approach strategy, working within a team to write proposal components, meeting application deadlines, and post-submission requirements using grants management tools and knowledge

INSTRUCTOR'S CLASSROOM POLICIES

COURSE RESPONSIBILITIES
Success in an online learning environment depends on student initiative, interaction, and participation. Your participation in the forums, thoughtful feedback to peers, and timeliness of assignments will heavily influence your success. Our basic responsibilities to one another for an online course are outlined below.

It is your responsibility to do the following:
- Be prepared to contribute each week to the online discussions
- Complete assignments on time
- Inform me of any problem or situation that may be interfering with your learning or performance in the course
- Provide feedback on the strengths and weaknesses of the course in a professional manner

It is my responsibility to do the following:
- Provide activities designed to accomplish course objectives
- Assist in providing an atmosphere conducive to learning
- Grade and return assignments in a timely fashion and appraise students of their progress on a regular basis
- Respond to student concerns

In addition, you should familiarize yourself with the IU Code of Student Rights, Responsibilities, and Conduct, available here: http://studentcode.iu.edu. The SPEA Honor Code is available here: https://spea.indiana.edu/doc/undergraduate/ugrd_student_honorcode.pdf.

Communication in an online format can be misinterpreted. Please limit assumptions and give each other the benefit of the doubt. If there is an issue, please bring it to me directly. My experience is that this is a great class comprised of thoughtful colleagues, and I enjoy sharing my passion for philanthropy with each of you.

OFFICE HOURS & COMMUNICATION
My goal is for this class to be as personal as possible, so please don't hesitate to schedule a phone meeting or email with questions. I am available to meet by phone varying days/times during normal business hours, contact me to schedule an appointment. I check in on the course daily during the week, but sporadically on weekends. If you contact me, expect a reply within 24-48 hrs during the week and the next business day on weekends. I am committed to providing the personal attention you need to be successful in this class; it is up to you to take advantage of that time if desired.

COURSE OVERVIEW
N557 provides the opportunity for each student to develop a complete proposal that will be reviewed and critiqued. Preferably, the proposal will be related to the student's employment or general interest area. **You are strongly encouraged to partner with a nonprofit organization to complete course assignments. You must have that organization identified prior to the class start if possible.** It is critical that you have access to needed information for the organization for which you will be developing a proposal. If this isn't possible, you may create a project idea that you can define and develop through the course as if you were going to present to an actual organization. The instructor will provide case materials to a student if a nonprofit partner is not available, and the student does not wish to create a

project idea. It is <u>not required</u> for you to actually submit the proposal as a part of this course; however you are encouraged to work with your partner organization to create a proposal that could actually be used for submission. Many students have created proposal projects through the course that are later awarded funding for the partner organization. Please see "Selecting a Nonprofit Organization Partner FAQs" section at the end of the syllabus.

<u>**ONLINE COURSE NAVIGATION: It's in the Modules!**</u>
Please visit the course home page and syllabus immediately for important course information. All other course relevant materials are located within the Module for each week.

Within each weekly **Module** you may find:

1. **Discussions** - See next section for extensive information on Discussion forum requirements and participation rubric.

2. **Assignments** - Submit assignments here and view rubric. Assignment handouts are also located here (if applicable to assignment). Label your assignment submission clearly at the beginning of the text with your name and assignment title. Format using single space, numbered pages, 12pt standard font and one-inch margins.

3. **Readings** – Assigned readings for the week include the sections listed in the syllabus referencing the course ebooks, as well as any readings posted in the additional readings section of the module for that week. The readings are due for the week's discussion starting on Monday of the week they are listed.

4. **Enrichment Opportunities – Webinar Enrichment Sessions (OPTIONAL)**
    There are 2 optional enrichment opportunities offered in the course as 30-60 minute webinar training/discussion sessions scheduled on Eastern time. Your participation in these is optional and will have no bearing on your grade, these are purely enrichment to help understand course materials and provide an opportunity for more personal interaction. Whenever possible, the sessions are recorded so those that are unable to attend the live session may view them later.

<u>**DISCUSSION FORUMS: HOW THEY WILL BE USED & EXPECTATIONS**</u>

- Monday to Thursday: Topic 1 – General Forum (GF) Group Active
- Wednesday to Saturday: Topic 2 – Sub Forum (SF) Group Active
- Sunday: Open for homework and readings – no forum responsibilities

This course uses discussion forums to facilitate conversation. The General Forum (GF) will bring the entire group together for discussion on a topic Monday – Thursday. The class is divided into 2 Sub Forum groups, which will address a second topic within the smaller group Wednesday – Saturday. Students will be assigned to a Sub Forum. Online discussion will complete posting by Saturday midnight.

<u>**INVOLVEMENT in forum group discussions is mandatory**</u>. I expect to see dialogue occurring on a regular basis, with post frequency, facilitating discussion, timeliness, and quality that meet the satisfactory requirements outlined in the rubric below. Posts should communicate concisely, in about 300 words or less. Posts will be respectful of other students, with positions of disagreement communicated in a respectful manner. Posts should avoid humor or sarcasm, which does not translate well in online environments. **Back posting or late posting is not accepted**. Posting ahead of schedule due to work or other commitments is fine if it meets the deadline. Example: Posting in GF on the Saturday prior to the forum opening is ok. Posting to SF on Tuesday prior to forum opening on Wednesday is ok. Please limit posting ahead to within one week of the discussion. *If you copy and paste content from source websites and post it as your own thoughts without citation, you will be reported for plagiarism.*

DISCUSSION FORUMS PARTICIPATION REQUIREMENTS

- **Post an average of 3 times per week total** (e.g. minimum of 2 posts in GF + 1 in SF **or** 2 in SF + 1 in GF *each* *week*). Post initial, midweek, and final or concluding contributions in a timely manner. Posts that are regularly done all at once (or bundled just to meet the average per week) will not be counted as they do not assist the learning environment, which is the focus of the postings. You should create original new posts for at least 2 of your posts, but on average at least one post per week should be in reply to a peer that helps drive the content and discussion deeper.

N557 Participation in Online Forums Rubric Students meeting satisfactory requirements in every category for the week (Frequency, Facilitating Discussion, Timeliness, Quality) will receive 8 points for that week's participation grade. If a student does not meet requirements in any one of the categories for the week, 0 points are awarded for that week. EXAMPLE: Student meets satisfactory requirements for facilitating discussion, timeliness, and quality but only posts twice in the week, which does not meet frequency requirement. Weekly Score = 0 points. 8 points per week X 8 weeks = 64 Total Points Possible Each student receives one "free pass" week, where the first 0 score is dropped and does not count against the overall participation grade. Instructor reserves right to adjust final participation score based on the totality of participation, using rubric as a guide. Instructor adjustment will never result in a grade lower than the rubric score.	

	Satisfactory	Does Not Meet Requirements
Frequency	• Posts an average of 3 times per week.	• Posts less than an average of 3 times per week.
Facilitating Discussion	• Posts are a mix of original posts and response to classmates. • At least one original post per week. • At least one post addressing each forum topic for the week (GF and SF).	• Posts are all replies to classmates, no original posts. • Posts are all original, no replies to classmates. • Either all GF or all SF posts.
Timeliness	• Posts are distributed throughout the week, during the week in which the forum is active. • Posts may occasionally occur the week/weekend before the forum opens if they are posted by the forum deadline.	• Posts are regularly all submitted close together (such as all posts an hour before the forum closes). • Back posting or late posts are not accepted.
Quality	• Comments are original thoughts drawing explicitly on readings, materials, and topic of the week.	• Post that simply responds or supports another student's view but adds no additional value to the discussion. • Post says only what the student liked or didn't like, without supporting information.

Grading scale

A+	**=**	**97-100%**
A	**=**	**93-96%**
A-	**=**	**90-92%**
B+	**=**	**87-89%**
B	**=**	**83-86%**
B-	**=**	**80-82%**
C+	**=**	**77-79%**
C	**=**	**73-76%**

Grade Policy

Late assignments are only accepted with pre-approval, and pre-approval is only granted on a case-by-case basis for emergencies. You must request, in writing, to turn in an assignment late *prior* to the due date of the assignment. Assignments that are late that do not meet this requirement will receive a 20% late point deduction.

Assignment	Date Due (By Midnight in YOUR time zone)	Points	% Composite
1. Personal Introduction (Graded Discussion Post)	August 30 (Friday)	20	6%
2. Project Proposal Plan	September 3 (Tuesday)	15	5%
3. Prospect Research Matrix & Analysis	September 9 (Monday)	20	6%
4. Project Need Statement	September 16 (Monday)	20	6%
5. Project Goals, Objectives and Outcomes	September 23 (Monday)	20	6%
6. Project Abstract	September 30 (Monday)	20	6%
7. Case Proposal Review	October 7 (Monday)	40	13%
8. Project Final Proposal	October 17 (Thursday)	100	31%
Participation (includes completion of course evaluation)	See participation rubric	64	20%
TOTAL		**319**	**100%**

Late Withdrawal

Withdrawal after the automatic withdrawal period requires approval by the instructor and relevant Program Director and must be based on dire circumstances relating to extended illness or equivalent distress (IU Enrollment and Student Academic Information Bulletin). Requests to drop due to a failing grade will not be approved. You must be passing the course at the time of withdrawal. Contact your advisor or the appropriate Program Director if you want to petition for late withdrawal.

NOTE: The auto-W deadline is NO LONGER THE LAST DAY OF CLASS (as it was during and post-Covid). After the auto-W deadline, withdrawal will be significantly limited and you will need permission to withdraw and must meet requirements established by O'Neill.

Academic Integrity
Please review student responsibilities at https://studentcode.iu.edu/

Use of AI in Coursework (such as ChatGPT)
You may use AI (such as ChatGPT) to assist in this course in the following ways:
- Need Statement assignment only (optional to use AI), but you must verify that the information it includes is correct and current. Documentation of outside sources is required.

If you use AI in an unauthorized manner, you will be committing plagiarism* and will be subject to penalties in this class and sanctions by Indiana University.

*Plagiarism is defined as presenting someone else's work, including the work of other students, as one's own. *Any ideas or materials taken from another source* for either written or oral use *must be fully acknowledged*, unless the information is common knowledge. What is considered "common knowledge" may differ from course to course. https://studentcode.iu.edu/responsibilities/academic-misconduct.html.

If you copy and paste content from source websites and post it as your own thoughts without citation, you will be reported for plagiarism.

Note Selling
Several commercial services have approached students regarding selling class notes/study guides to their classmates. Selling the instructor's notes/study guides in this course is not permitted. Violations of this policy will be reported to the Dean of Students as academic misconduct (violation of course rules). Sanctions for academic misconduct may include a failing grade on the assignment for which the notes/study guides are being sold, a reduction in your final course grade, or a failing grade in the course, among other possibilities. Additionally, you should know that selling a faculty member's notes/study guides individually or on behalf of one of these services using IU email, or via Canvas may also constitute a violation of IU information technology and IU intellectual property policies; additional consequences may result.

Online Course Materials
The faculty member teaching this course holds the exclusive right to distribute, modify, post, and reproduce course materials, including all written materials, study guides, lectures, assignments, exercises, and exams. While you are permitted to take notes on the online materials and lectures posted for this course for your personal use, you are not permitted to re-post in another forum, distribute, or reproduce content from this course without the express written permission of the faculty member. Any violation of this course rule will be reported to the appropriate university offices and officials, including to the Dean of Students as academic misconduct.

Counseling and Psychological Services
For information about services offered to students by CAPS:
http://healthcenter.indiana.edu/counseling/index.shtml.

TimelyCare
Indiana students have free, 24/7 access to virtual mental health care services with TimelyCare. Students do not need insurance to access TimelyCare services. https://www.iu.edu/mental-health/find-resources/timely-care.html#0

Religious Observation
In accordance with the Office of the Dean of Faculties, any student who wishes to receive an excused absence from class must submit a request form available from the Dean of Faculties for each day to be absent. This form must be presented to the course instructor by the end of the second week of this semester. A separate form must be submitted for each day. The instructor will fill in the bottom section of the form and then return the original to the student. Information about the policy on religious observation can be found at the following website: https://policies.iu.edu/policies/aca-59-accommodation-religious-observances/index.html.

Accessible Educational Service (formerly Disability Services for Students)
Securing accommodations for a student with disabilities is a responsibility shared by the student, the instructor and the AES Office. For information about support services or accommodations available to students with disabilities, and for the procedures to be followed by students and instructors: https://studentlife.indiana.edu/student-support/iub-aes/index.html

Sexual Harassment
As your instructor, one of my responsibilities is to help create a safe learning environment on our campus. Title IX and our own Sexual Misconduct policy prohibit sexual misconduct. If you have experienced sexual misconduct, or know someone who has, the University can help.

If you are seeking help and would like to talk to someone confidentially, you can make an appointment with:
   i. The Sexual Assault Crisis Service (SACS) at 812-855-8900
   ii. Counseling and Psychological Services (CAPS) at 812-855-5711
   iii. Confidential Victim Advocates (CVA) at 812-856-2469
   iv. IU Health Center at 812-855-4011

For more information about available resources: http://stopsexualviolence.iu.edu/help/index.html. It is also important to know that federal regulations and University policy require me to promptly convey any information about potential sexual misconduct known to me to our campus' Deputy Title IX Coordinator or IU's Title IX Coordinator. In that event, they will work with a small number of others on campus to ensure that appropriate measures are taken and resources are made available to the student who may have been harmed. Protecting a student's privacy is of utmost concern, and all involved will only share information with those that need to know to ensure the University can respond and assist. I encourage you to visit http://stopsexualviolence.iu.edu/help/index.html to learn more.

Commitment to Diversity: Find your home and community at IU

Asian Culture Center
Address: 807 East Tenth Street, Bloomington, IN 47408
Phone: 812-856-5361
Email: acc@indiana.edu
Website: https://asianresource.indiana.edu/index.html

First Nations Educational & Cultural Center
Address: 712 E 8th St., Bloomington, IN 47408
Phone: 812-855-4814
Email: fnecc@indiana.edu
Website: https://firstnations.indiana.edu/contact/index.html

Jewish Culture Center
Address: 730 E 3rd St., Bloomington, Indiana 47401
Phone: 812-336-3824
Website: https://iuhillel.org/iu-jewish-culture-center

LGBTQ+ Culture Center
Address: 705 E 7th St., Bloomington, Indiana 47408
Phone: 812-855-4252
Email: glbtserv@indiana.edu
Website: https://lgbtq.indiana.edu/contact/index.html

La Casa Latino Culture Center
Address: 715 E 7th St., Bloomington IN, 47408
Phone: 812-855-0174
Email: lacasa@indiana.edu
Website: https://lacasa.indiana.edu/

Neal-Marshall Black Culture Center
Address: 275 N Jordan Ave Bloomington, Indiana 47405
Phone: 812-855-9271
Email: nmgrad@indiana.edu
Website: https://blackculture.indiana.edu/index.html

The below schedule is subject to limited change in the event of extenuating circumstances.

WEEK 1 (AUGUST 26-31): Introduction, Philanthropy & Grantsmanship Fundamentals

Discussion Topics:
>Orientation to class
>Overview of Philanthropy
>Overview of Fund Raising
>Grantsmanship as part of a comprehensive fundraising program
>Mission and Vision
>Equation for Success
>Types of funders to whom proposals could be submitted
>Case for Support
>Big Picture Strategy

Assignment and Activities:
>==Project #1 Introduction - Due Friday August 30==. Post to Introductions forum with info below AND Post a response to <u>two</u> others in the class: *(20 points total – all or nothing so be sure to answer the questions and post to at least 2 classmates. The Introductions posting assignment DOES NOT count towards your participation for week 1. You must post in the Week 1 General Forums for participation points.)*
>
>>✓ Introduce yourself and tell us a little about you
>>✓ Share your nonprofit partner organization for the class (or project you are making up)
>>✓ Share any expectations you have of the course
>>✓ Share your perceptions of the not-for-profit sector
>>✓ Provide a post feedback or question to <u>two</u> other students in reply to their introduction post

>*==Upcoming: Project #2 Proposal Plan - Due Tuesday September 3==. Discuss the proposal you will write for this class with your partner organization. 15 points total, as outlined in Part 1 & Part 2 below*

>**Part 1.** Assignment should follow the bulleted format below for both Part 1 & 2, no essays.

>Answer the following:

>- What is the problem or need your project is addressing?
>- What is expected outcome if funds are invested in solving the problem?
>- Why is it important to accomplish (What are the inherent values)?
>- What does the organization need to learn from you through this class?
>- What do you need to learn through this class to serve the organization?

>If you are making up a project or using case materials, use your best judgment to answer the last 2 questions. *10 points total (2 points per topic listed above)*

>**Part 2.**

>Review the Nonprofit Grant Guidebook, Nonprofit Grant Proposal Toolkit, Grant Space website sample proposals (https://grantspace.org/resources/sample-documents/?tab=full-proposals - best viewed in Chrome browser, Grantspace resources currently not showing correctly in Safari browser), and any other resources you may have or previous proposals you have written. Review each section of the proposal that will be needed for your final proposal (pg. 43 Nonprofit Grant Guidebook, full proposal format plus cover letter). Determine what information specifically you will need to obtain from the organization and possible approaches for securing that information. List at least 10 types of information that will be needed and a possible source for each. Examples include: organization history – potential source organization website, organization contact, prior proposal, case statement, etc. *5 points total (All or nothing, less than 10 types of info with potential source for each will receive 0 points.)*

Required Book Readings:
> Philanthropic Sustainability Handbook (Levy) - all
> Nonprofit Grant Guidebook (Levy) will need to be read in full by week 2

Required Readings in Canvas Module Week 1:
> Lecture Notes - Overview of the Sector
> Michael Radock, "Words to the Wise: Foundation Executives' Comments on the Most Frequent Errors Made in Grant Proposals"
> Tim Seiler, "Roadmap to Fundraising Success"
> Lecture Notes – Case for Support & Culture of Philanthropy
> Lecture Notes - Mission, Vision, Core Values
> Foundation Center, "Foundation Growth and Giving Estimates" (interactive website)
> Clara Miller, "Gift Horse or Trojan Horse? A Thorough Physical is Critical"
> SKIM: Center for Effective Philanthropy, "Strengthening Grantees: Foundation and Nonprofit Perspectives"

WEEK 2 (SEPTEMBER 1-SEPTEMBER 7): Prospect Research & Need

No Class Sept. 2 Labor Day

Discussion Topics:
> Discussion of various types of research resources, their location and accessibility.
> Research experience
> Inquiry Letter
> Need statements

Assignment and Activities:
> ***Project #2 Proposal Plan - Due Tuesday September 3***.

> ***Upcoming: Project #3 Prospect Research Matrix & Analysis - Due Monday September 9***. *20 points total, as outlined below*

> **See Prospect Research Matrix Template & Analysis Handout for step-by-step instructions.**

> This assignment has 2 components: Prospect Research Matrix Template (Excel file – *5 points*), and Prospect Research Analysis (Word file – *15 points total, as outlined below*).

> Prospect Research Matrix Template – Complete the Excel template for top 3 foundation prospects. See assignment handout for step-by-step instructions *5 points*

> Prospect Research Analysis -

> **Part 1. Create a table using the Analysis Part 1 Example in handout.** For each prospect, list search terms you used in FDO. List the total number of prospects returned from those search terms. If you did not use FDO, indicate specifically where each prospect was located. List sources utilized for each prospect to provide information in the matrix. *5 points*

> **Part 2. Answer the following questions:**
> A. In a paragraph, describe the process of elimination you used to choose the top 3 prospects. Specifically identify 3 factors you utilized to narrow down the prospects and describe why. If your results returned too many prospects to filter, outline how you would recommend the organization tackle this task. Your answer should focus on the <u>process</u> of filtering prospects (ie, what factors were you using to decide, NOT what your decision actually was.) *10 points*

Required Book Readings:
       Nonprofit Grant Guidebook (Levy), Chapters 1-4 Specific to this week. Have entire book read by this week and reference relevant chapters for each successive week.
       Nonprofit Grant Guidebook Proposal Toolkit (Levy) – Have entire book read by this week and reference relevant chapters for each successive week.

Required Readings in Canvas Module Week 2:
       Helen Tygret, "Communicating Program Impact" Presentation Slides
       Helen Tygret, "Communicating Program Impact" Webinar
       SKIM: NSF Approach Guide for Grants
       Accessing Foundation Directory Online for IUB Students

WEEK 3 (SEPTEMBER 8-14): Project Development & Evaluation

Discussion Topics:
       Goals
       Objectives
       Outcomes
       Solution/Methods
       Evaluation section of the proposal and how to measure accomplishment of objectives
       Creative ways to evaluate
       Logic Models
       Cost of evaluation and how to direct evaluation, and its purpose

Assignment and Activities:
       Project #3 Prospect Research Matrix & Analysis - Due Monday September 9

       Upcoming: Project #4 Need Statement – Due Monday September 16. Create a need statement that articulates the nexus of need and mission. Follow Nonprofit Grant Guidebook requirements for need statement and see grade rubric for grading scale. *20 points*

       NOTE: You may use ChatGPT for the Need Statement assignment only (not other assignments, and using it for the need statement is optional), but you must verify that the information it includes is correct and current. Documentation of outside sources is required.

Required Book Readings:
       Nonprofit Grant Guidebook (Levy) – Chapter 1-6
       Nonprofit Grant Proposal Toolkit (Levy) – Review relevant sections as needed

Required Readings in Canvas Module Week 3:
       Goal 1 Logic Model
       Logic Model Sample
       Sample Objectives and Outcomes
       Fataneh Zarinpush, "Project Evaluation Guide for Nonprofit Organizations"
       Sample Funder Evaluation Report
       SKIM: Kellogg Foundation, "Logic Model Development Guide"

★**Enrichment Opportunity** – 60 minutes
Monday, September 9, 12:00pmEST. Topic Goals, Objectives, Outcomes, Impact. Webinar info provided via Canvas.

WEEK 4 (SEPTEMBER 15 – 21): Budgets, Future Funding & Solution

Discussion Topics:
>Preparing the budget
>Budget submission
>Types of budgets
>Future Funding
>Solution/Method

Assignment and Activity:
>*Project #4 Need Statement – Due Monday September 16*.

>*Upcoming: Project #5 Goal/Objectives/Outcomes – Due Monday September 23*
>Create the goal, objectives, outcomes section as relevant to your project. You may utilize any of the recommended formats outlined in the book, choose the best format for your project. Follow Nonprofit Grant Guidebook requirements for goals/objectives/outcomes and see grade rubric for grading scale. *20 points*

Required Book Readings:
>Nonprofit Grant Guidebook - Chapter 6
>Nonprofit Grant Proposal Toolkit – Review relevant sections as needed

Required Readings in Canvas Module Week 4:
>Formulas for Calculating Space and Salary Costs of a Program
>Chronicle of Philanthropy, "Watchdog Cracks Down on Misleading Reports on Fundraising Costs"
>Chronicle of Philanthropy, "Rules for Reporting Fundraising Costs: Ideas & Advice"
>Chronicle of Philanthropy, "How Fundraising Material Can be Counted as a Program Cost"
>SKIM: Andrew J. Grant, "Budget Strategies that Win Grants: Making Your Case with the Balance Sheet"
>Reading NPO Financial Statement
>Chronicle of Philanthropy, "How to Impress a Grant Maker with Your Proposal Budget"
>SUPPLEMENTAL RESOURCE, not required: US Department of Labor, "A Guide for Indirect Cost Rate Determination"
>SUPPLEMENTAL RESOURCE, not required: Compassion Capital Fund, "Managing Public Grants"

WEEK 5 (SEPTEMBER 22-28): Post-Submission & Thinking Long-Term In Grantsmanship

Discussion Topics:
>Post submission issues, concerns, and challenges
>Funding nonprofit overhead costs through grantsmanship
>Building long-term relationships with funders
>Impact trend

Assignment and Activity:
>*Project #5 Goal/Objectives/Outcomes – Due Monday September 23*

>*Upcoming: Project #6 Abstract – Due Monday September 30*. Create the abstract section as relevant to your project. Follow Nonprofit Grant Guidebook requirements for abstract section and see grade rubric for grading scale. *20 points*

Required Book Readings:
>   Nonprofit Grant Guidebook - Chapter 6
>   Nonprofit Grant Proposal Toolkit – Review relevant sections as needed

Required Readings in Canvas Module Week 5:
>   CASE PROPOSAL TO REVIEW FOR ASSIGNMENT PROJECT 7
>   Chronicle of Philanthropy, "Grantseeking Goes Paperless."
>   Foundation Center, "Online Grant Applications and Reporting: Practical Wisdom and Recommendations for Grantmakers"
>   SKIM: The Bridgespan Group, "The Donor Grantee Trap"
>   Sample Overhead Cost Proposal
>   Center on Philanthropy Press Release, "Study Highlights Tensions Between Foundations and Nonprofits over Funding Policies"
>   Hager, Rooney, Pollak, Wing, "Paying for Not Paying for Overhead"
>   Jane Hexter, "Building Relationships with Grantmakers"

WEEK 6 (SEPTEMBER 29 TO OCTOBER 5): Foundation Procedures, Process Management And Review

Discussion Topics:
>   Grantsmanship Situation Review
>   Internal and external review process.
>   Foundation procedures
>   Final proposal

Assignment and Activity:

>   *Project #6 Abstract – Due Monday September 30*.

>   *Upcoming: Project #7 Case Proposal Review – Due October 7*. Review the proposal distributed by instructor with the perspective of a funder. In 2 pages or less, address the points below. Refer, where appropriate, to additional readings. *Use the outlined bullet point format below or 20% will be deducted. No essay formats, please. 30 points total, as outlined below.*

a) What is your perception of the organization based just on this proposal? *(1 point)*
b) What do you believe are the 3 most important things that should influence your evaluation of this proposal? Explain each. *(9 points total, 3 points per each identification/explanation)*
c) Identify 2 strengths of this proposal and explain why. Specifically state if the strength is a project development issue or a proposal writing issue. *(6 points total, 1 point per strength, 1 point per explanation, 1 point per identification of project or writing issue)*
d) Identify 2 challenges or areas of weakness in this proposal and explain why. Specifically state if the challenge is a project development issue or a proposal writing issue. *(6 points total, 1 point per weakness, 1 point per explanation, 1 point per identification of project vs writing issue)*
e) Identify what your recommendation is and why: Fund it, not fund it, get more info. *(4 points total, 2 points for recommendation, 2 points for why)*
f) What is the number one thing you would do to make this a successful proposal and why? *(4 points total, 2 points for identification, 2 points for why)*

Required Book Readings:
>   Nonprofit Grant Guidebook - Chapter 6
>   Nonprofit Grant Proposal Toolkit – Review relevant sections as needed

Required Readings in Canvas Module Week 6:
CASE PROPOSAL TO REVIEW FOR ASSIGNMENT PROJECT 7
Brian Satterfield, "An Introduction to Grant Reports"
Audio session with Christine Marson, Lumina Foundation Program Officer provided via Canvas.

★**Enrichment Opportunity** – 60 minutes
Monday, September 30, 12:00pm EST – Final Proposal Review, Webinar info provided via Canvas.

WEEK 7 (OCTOBER 6-12): Managing the Grantsmanship Process: Systems & Structure & Government Grants

Discussion Topics:
Administration of grantsmanship
Creating systems and structure for success
Government Grants

Assignment and Activity:
Project #7 Case Proposal Review *– Due October 7*.

Upcoming: Project #8 Final Proposal – Due Thursday October 17. Submission of final proposal using the format the Comprehensive Format from the Nonprofit Grant Guidebook (pg. 43) with a cover letter included. You may choose to use or omit optional sections as needed based on your specific proposal. *100 points – see grade rubric*

Required Book Readings:
Nonprofit Grant Guidebook – Chapter 7 - 9
Nonprofit Grant Proposal Toolkit – Review relevant sections as needed

Required Readings in Canvas Module Week 7:
Henry Flood, "Designing a Grants Filing System that Works"
Henry Flood, "Essentials of Grants Management: A Guide for the Perplexed"
Helen Tygret webinar, "Government Grants"
Optional: Compassion Capital Fund, "Managing Public Grants"

WEEK 8 (OCTOBER 13-17): Ethics & Consulting in Proposal Development

Discussion Topics:
Ethics in proposal preparation and grants management
Working as a consultant
Hiring a consultant
Knowing what you need and what to look for
Using volunteers

Assignment and Activities:
Final Proposal Project due Thursday October 17

Required Book Readings:
Nonprofit Grant Guidebook – Chapter 6 - 9
Nonprofit Grant Proposal Toolkit – Review relevant sections as needed

Required Readings in Canvas Module Week 8:
Donor Bill of Rights
eDonor Bill of Rights
Consulting Fees for Grant Proposal Writing
Joanne Fritz, "Should We Hire a Professional Grant Proposal Writer?"

SELECTING A NONPROFIT ORGANIZATION PARTNER FAQs

I don't have a partner organization. What should I do?
Start with organizations where you have a connection or a personal interest. Some examples might be your place of employment, where you volunteer, your house of worship, professional associations, sports organizations, groups your children are involved with, etc. You will get the best experience out of the course when you work on a project you care about, and you are more likely to get cooperation and timely information from an organization with which you already have a connection.

None of those examples apply to me. What else can I do?
What are your passions? Choose a local nonprofit organization in your passion area and approach them to see if they would like to work with you. When you work locally and can meet with an organization in person, again you are likely to get more out of the project and better response from the organization. You may also approach an organization that is not local to you, but sometimes those relationships are harder to establish.

I've tried everything, and no organization will partner with me. Now what?
You may create a project yourself for an existing or made-up organization.   If you choose a real organization, you may use existing public information to fill in the blanks as much as you can and make up the rest as needed. This option can be more challenging since you must come up with all the information yourself, but it does allow you to create something tied to your passion area. Worst case scenario, the instructor can provide some sample case materials to utilize. This will still require you to come up with a project and fill in some blanks yourself but gives you an outline for a sample organization to follow.

I work at a nonprofit organization, can I use my employer as my partner organization?
Yes! These often make the best project partnerships because you presumably already have knowledge of the organization and access to needed project information.

My nonprofit won't respond and (fill in the blank) assignment is due, what now?
Every effort should be made to obtain accurate, correct information from your partner organization. However, I realize that sometimes this is not possible when you are working with an outside organization. For the proposal assignments, you may create reasonable information if it is missing from your partner organization. The information should be appropriate to the project. I care more that you understand how to assemble the components of the proposal, not whether you list snacks on your budget as costing $5 per person or $6 per person. However, you should make every attempt to put together reasonable information for the project. If you put snacks as $50 per person it may raise an eyebrow with a funder whether this is reasonable, and that will ultimately have an impact on the assignment grade. Please contact the instructor for guidance if you have questions about filling in necessary information.

Are we required to actually submit the proposal as a part of our course grade?
No. As you will learn in the course, there are many factors that go into an appropriate funding approach and submission. You are highly encouraged to share your final project with your partner organization and debrief with them if/how the proposal may be utilized in the future. In many cases, students let me know their proposal projects are actually submitted by the nonprofit organization and funded. (This is awesome, please let me know when this happens for you!) Often student proposals form the basis for a strong template the organization can use for future proposal work. Remember, the nonprofit organization forms a binding contract with a foundation when they accept funding, so it is ultimately always up to the organization to submit proposals. Students should not submit proposals on behalf of an organization without the organization's expressed approval.

Do I use an existing project for my partner organization or create one myself?
This depends on your partner organization. If they have an existing project they would like for you to use, great. This provides you with a highly applicable, real-world experience. If you have something in mind you would like to develop, you may use the partner organization to help fill in the blanks for information.

What information should I request when I meet with my partner organization to complete the projects?
Review the Nonprofit Grant Guidebook pg. 43 for a list of all components in the Full Proposal Format required for the final project. You will need information to complete those requirements. Generally, much of this type of information can be found in a case statement if the organization has one available. If the organization has completed proposal work in the past, it may be willing to share the existing materials with you. If it is a new project, or the organization has no existing prepared materials or proposal experience, you will have to spend time in discussion with someone from the organization to gather the needed information.