

Fund Development for Non-Profit Organizations
AADM Y558 / SPEA N558
Spring 2025, Tuesday/Thursday 12:45pm-2pm
Classroom: SPEA A223
Syllabus¹

Instructor: Karen Gahl-Mills
Drop-in Office Hours: Mondays, 4:00pm – 6pm, and by arrangement
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Course Description and Objective:

Most non-profit organizations in the United States must raise money from donors in order to carry out their work. In this course, we will study the basics of philanthropy and fundraising, and we will examine effective ways to make the case for philanthropic support to different donor constituencies. By the end of this course, I hope that students will be able to articulate a point of view about effective fundraising practice, and they will be able to create a case for support for a non-profit organization.

Required Reading:

Textbook:

Achieving Excellence in Fundraising, 5th edition. Genevieve Shaker, Eugene Tempel, Sara Nathan, Bill Stanczykiewicz, editors.

(Yes, I'm asking you to purchase a textbook. It's a really good one. Sadly, despite my begging and pleading, there is no electronic version of it yet. The 4th edition is available online through the library, but the chapters are different and not as up-to-date. At last check, Amazon had it for about \$60. If that's a hardship for you, please speak up and we'll figure something out. There is also a copy on reserve in the Business/SPEA library.)

Additional required readings are posted to Canvas.

All of the course readings and lectures have been curated to provide a foundation for our work together. Please make time to carefully read everything that is required before class. You will

¹ The University requires me to include many policy and resource documents as part of the course syllabus. You will find them in the "Syllabus Policy Appendix" posted to Canvas; please read them and consider them an integral part of the course.

write three essays in which you will be required to cite the course readings. In addition, we will discuss current events in class, as philanthropy and fundraising are constantly in the news. Please stay current by making use of free student subscriptions to major newspapers, and check ArtsJournal regularly for arts-related news items from other outlets.

Classroom Environment:

I aim to provide an inclusive and accepting classroom environment, one that supports curiosity and encourages experimentation. There are truly no “silly” questions in this class; we will all learn more if you ask questions even when you think something is obvious to others. We will tackle material and undertake exercises in which you will be pushed out of your comfort zone, and I encourage you to embrace them, knowing that to try is to learn. Learning isn’t a spectator sport; please engage with us.

With that in mind, I ask you to please refrain from using your devices (laptop, tablet, phone) for non-class related activities during class time. [Research](#) demonstrates that note-taking by hand is beneficial for learning; consider taking notes by hand rather than typing them on a keyboard and opening yourself up to technology distraction. By putting your phone away / on airplane mode during class, you will increase your ability to focus. In addition, please refrain from recording our class sessions and guest lecture presentations.

Please prioritize attending class in person, arriving on time, and staying in your seat for the entire 75-minute class period, out of respect for your classmates, for me, and for our guests.

Expectations:

Setting clear expectations is the key to any successful working relationship. As students, you can expect the following from me:

- I will come to class prepared and ready to engage in lively (but civil) discussion.
- When I am in class, my attention will be only on our work together.
- My **drop-in office hours**, Mondays 4-6pm, are designated specifically to meet with students, and I welcome the opportunity to meet with you outside of class. You may attend in-person in A323 (inside the Master’s Program Office) or on Zoom (<https://iu.zoom.us/j/86917865773>). Office hours are first come, first served, with priority given to in-person attendees. I am also happy to meet with you at other times if you have a conflict during my office hours. Just ask.
- I will be clear about the limitations of my expertise and, whenever appropriate, I will bring other content experts into our learning environment.
- I will respond to inquiries promptly, typically within 1 business day.
- I will use Canvas announcements to communicate with you. Please correspond with me via email (kgahlmil@iu.edu) **not** through Canvas mail.

As the instructor, I expect the following from students:

Participation:

All will benefit from a class in which informed, civil dialog and discussion replace one-way delivery of a lecture. Participation, therefore, will be approximately 10% of your total grade.

Participation grades are subjective and will be based on the following:

- Attending all class meetings, arriving on time, and staying for the entire class.
- Completing assignments on time.
- Listening actively in class.
- Participating in class discussions.
- Providing thoughtful and appropriate feedback to your colleagues through in-class work.
- Demonstrating a working knowledge of the readings assigned for each week.
- Asking appropriate questions of our guests.

Attendance:

I expect that you will attend class regularly. To create an environment of learning and experimentation, we all need to be present and engage with the material. Regular attendance will factor into your participation grade.

(That said, if you are sick, please do not come to class and share your germs. The rest of us thank you in advance.)

If you get sick, or in the case of another kind of emergency, please reach out to me **before** class. Please make sure to get notes about what you missed from a classmate, and consider coming to drop-in office hours to review the material that you missed with me. (Please do *not* share correspondence / absence notes from your doctor or the health clinic with me.)

You may miss 3 class meetings without any need to send me an excuse and without any effect on your participation grade. Life happens, I understand. 3 absences = 10% of our class meetings. I do not recommend missing that much of the course; please use this flexibility wisely.

Grades and Assignments:

Grades will be determined by the University's grading policy, found here:

<https://policies.iu.edu/policies/aca-66-grades-and-grading/index.html>

I will assign letter grades based on the following scale (the default scale displayed in Canvas):

Letter Grade Range

A+	100% to 97.0%
A	< 96.9% to 93.0%

Letter Grade Range

A-	< 92.9% to 90.0%
B+	< 89.9% to 87.0%
B	< 86.9% to 83.0%
B-	< 82.9% to 80.0%
C+	< 79.9 % to 77.0%
C	< 76.9 % to 73.0%
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C-	< 72.9 % to 70.0%
D+	< 69.9% to 67.0%
D	< 66.9% to 63.0%
D-	< 62.9% to 60.0%
F	< 59.9% to 0%

I do not round grades. **Note that the last day to drop this course with an auto-W is 16 March 2025 (right before Spring Break.)**

Your grade will be calculated as follows:

- Participation / attendance - 10% (see above)
- Other in-class assignments – 10%
- 3 x written essays = 40%
- Final project = 40% Details below. * final documents may not be submitted late *

Please take time at the beginning of the semester to note all assignment due dates. I accept late work for partial credit, with the exception of the final project deliverable. Generally, you will lose one point per day late for assignments turned in within 7 days of the assignment due date. Assignments turned in after 7 days of the assignment due date will receive partial credit at my discretion.

Academic Dishonesty:

I expect that you do your own work and that you do not try to take undue credit for the work of others. It is important that you cite your source material in all written assignments. You may use any recognized citation format; visit [IU Libraries](#) for more information, or ask me for help.

A note about [plagiarism](#): when writing assignments or exams, if you present the ideas of others as your own, you will be committing plagiarism. Plagiarism is defined as presenting the work of another – which can include material from books, articles, another’s student’s work, work that you purchased, works available on the Internet, works produced by generative AI, such as ChatGPT or similar – as your own. Failure to acknowledge your source material will be penalized as academic misconduct.

<https://studentcode.iu.edu/procedures/bloomington/discipline/academic-misconduct/index.html>

I realize that generative AI tools, such as ChatGPT, can be useful for ideation or to proofread your work. It would not be productive for me to suggest that you should never use these tools. However, you need to know their limitations: in this class, you will be asked to synthesize material and describe your point of view about said material, and you can't outsource your thinking to anything or anyone. Generative AI should *never* be a substitute for doing your own work. If you do choose to use these tools, failure to cite the tool as a source, including the prompt that you used and the response that you received, will be treated as the serious academic misconduct that it is.

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Final Project Guidance

A written case for support is the rationale that undergirds all fundraising efforts, and so learning to write a case for support for a capital campaign is a worthy endeavor for all students of fundraising, whether or not you pursue a fundraising career. Many organizations will undertake "special" campaigns, such as capital campaigns, and the creation of a case statement and campaign target is good practice for this work.

You will complete this project with a team of 3-4, and you will choose your team members. This project will be equal parts quantitative and qualitative. It will also require you to make assumptions, as you will be crafting believable but fictional recommendations about how the organization will move forward. It will require significant writing and an oral presentation at the end of the term. Seek out team members with complementary strengths. More about this in week 1.

As a team, choose a 501c3 non-profit organization with which you are familiar. It need not be based near Indiana University, though it can be. Choose an organization large enough to have a significant web presence and large enough to complete an IRS form 990 (not 990-N or 990-EZ) with an operating budget no less than \$2 million annually and no more than \$100 million annually. Choose an organization that provides direct services to the public (not, for example, a foundation that primarily gives out money.) You will do your primary research from publicly available sources, so choose an organization big enough to have some (robust website, multiple 990s, active social media presence, etc.) **You will submit your team + your chosen organization on 21 January 2025 via Canvas**

The assignment:

Part 1 (due 23 February 2025 at 9pm eastern)

You will gather and study the documents necessary for the internal case-making (textbook chapter 13). Use the organization's website, Candid (Guidestar) profile, IRS 990 documents, and any other publicly available resources. While you are free to request information from the organization a lack of response is not a valid excuse for not completing the assignment. The required elements should all be publicly available.

Required elements must include at least:

- Mission statement
- Brief history of the organization
- Organizational overview – what do they do, and how do they do it
- Financial statements – balance sheet, income statement (use 990)
- Governance and staffing structure

Analyze these documents and write a two-page summary (approx. 1000 words, note word count on cover page) that addresses the following questions:

1. What does this organization do? Who does it serve?
2. Assess the relationship between the organization's mission and the programs that it offers. In your opinion, are the programs aligned with the mission? Why or why not? Any obvious gaps?
3. Using the financial exercises from week 4, assess this organization's financial health. In your opinion, is it weak? Strong? How did you draw this conclusion? (Show your work; do not rely on the Guidestar financial snapshot to complete this portion.)

Please submit the required elements as source material in an appendix to your narrative.

Part 2 (due 30 March 2025 at 9pm Eastern)

Working with the documents that you gathered for part 1:

- Complete a SWOT analysis for the organization, concentrating on elements required for successful fundraising (one page)
- Create a campaign target, and explain your rationale for why you believe this target is achievable. (one page)
- Create a sample case statement in 2-3 sentences based on campaign target identified above.

Part 3: Presentation & Final Case Statement: paper due 4 May 2025 at 9pm Eastern.

Prepare a 6-minute presentation for the class, assuming that the class represents the organization's biggest donor. You will not have more than 6 minutes to present, so plan accordingly. The presentation should cover all of the elements of the case and end with a request for support, concentrating on why you feel your request is reasonable and appropriate. Be prepared to entertain questions from your classmates. The presentation will be given during class time on Thursday, 1 May 2025.

The final, written case statement must incorporate all of the elements in parts 1 & 2 in a coherent and concise narrative between 2500 - 3500 words. **Late work will not be accepted.** In addition, it should include the following attachments:

- Create a gift table that demonstrates the gifts needed to reach the target. (1 page)
- Create a sample solicitation letter for a major donor and a sample acknowledgement letter that assumes that the gift was made as asked. (solicitation = up to 1000 words on 2 pages; acknowledgement = 1 page)
- Create a sample solicitation letter for a corporation and a sample letter of inquiry to a foundation (1 page each)

Tentative Discussion Schedule and Assignment Due Dates

(subject to change; please check Canvas regularly)

Module 1: The Basics

Week 1	Jan 14 + 16	Course Overview, The Basics of Philanthropy
Week 2	Jan 21 + 23	The Basics of Fundraising
	Jan 21	Submit group name and organization for study no later than 9pm Eastern
Week 3	Jan 28 + 30	Successful Fundraising: Planning + People
Week 4	Feb 4 + 6	The Revenue Mix: Let's Talk About Numbers
	Feb 9	Essay #1 due, 9pm Eastern

Module 2: Exploring the Components of Contributed Revenue

Week 5	Feb 11 + 13	Individual Giving, part 1
Week 6	Feb 18 + 20	Individual Giving, part 2
	Feb 23	Project part 1 due, 9pm Eastern
Week 7	Feb 25 + 27	Capital Campaigns & Planned Giving
Week 8	Mar 4 + 6	Institutional Philanthropy
	Mar 9	Essay #2 due, 9pm Eastern

Module 3: Building our Skills

Week 9	Mar 11 + 13	Grant Writing Basics
Week 10	*** spring break – no class meetings ***	
Week 11	Mar 25 + 27	Effective Solicitation
	Mar 30	Project part 2 due, 9pm Eastern

Week 12 Apr 1 + 3 Saying "Thank You!"

Week 13 Apr 8 + 10 Legal and Ethical Issues

Apr 11 Essay #3 due, 9pm Eastern ** note this is a Friday **

Module 4: Wrapping up

Week 14 Apr 15 + 17 So You Want to Get a Job in Development?

Week 15 Apr 22 + 24 Remaining Questions

Week 16 Apr 29 Course Summary

May 1 In-Class Group Project Presentations

May 4 Final Project deliverables due, 9pm Eastern