

**SYLLABUS**  
**PUR 6416 (023A)—PUBLIC RELATIONS AND FUND RAISING**

**Instructor**

Dr. Kathleen Kelly, APR, Fellow PRSA  
Professor  
Weimer 3056  
(352) 392-9359  
kskelly@jou.ufl.edu

**Traditional Office Hours:**

T&W—Period E-1 (7:20–8:10 p.m.)  
W—Period 8 (3 – 3:50 p.m.)  
or by Appointment

**Virtual Office Hours (E-mail):**

M – Period E1 (7:20-8:10 p.m.)

**COURSE DESCRIPTION:**

PUR 6416—Public Relations and Fund Raising provides an in-depth examination of the principles and practice of fundraising, a high demand, low supply occupation unique to the charitable nonprofit subsector. The organizational function is approached as a specialization of public relations. Emphasis is on theory and theory-based practice. The managerial role of practitioners is the central focus. The course is the first of two required courses for the “Graduate Certificate in Fundraising Management.” It also *may* be designated an “Advanced-level course” in the College of Journalism and Communications’ doctoral program, meaning Ph.D. students enrolled in the course are required to complete an original scholarly paper (academic conference quality) that advances knowledge in the field.

**COURSE FORMAT:**

The course follows a seminar format consisting primarily of lectures and class discussions. Each student will make an oral presentation on a trend or recent issue in fundraising. Several guest speakers will join the class to demonstrate how scholarly principles are related to the professional practice of fundraising in large charitable organizations. A high degree of student interaction is expected.

**COURSE GOALS:**

The overall goal of PUR 6416 is to prepare degree-seeking graduate students and post-baccalaureate practitioners with knowledge and skills in fundraising practice and to encourage doctoral students to conduct research and teach classes on fundraising and charitable nonprofits. The course enables students to gain an understanding of:

- (1) Fundraising as an important management function of charitable organizations;
- (2) The historical development and contemporary status of fundraising practice, with emphasis on law and ethics; and
- (3) The principles, process, and programs of fundraising, including
  - systems theory, theory of the commons, situational theory of publics,
  - four models of fundraising, theory of fundraising practitioner roles,
  - fundraising process of ROPES,
  - primary programs of annual giving and major gifts, and
  - three donor publics.

**STUDENT LEARNING OUTCOMES:**

The course has three student learning outcomes (SLOs), of which the first two will be assessed and the third will be introduced in the course. Students completing PUR 6416 will be able to:

1. Identify and discuss concepts and theories relevant to effective fundraising practice;
2. Defend professional ethical principles and the importance of truth, honesty, accuracy, fairness and diversity;
3. Demonstrate critical, creative, and independent thinking about fundraising problems.

## COURSE TEXTS:

**Required:** Kelly, K. S. (1998). *Effective fund-raising management*. Mahwah, NJ: Lawrence Erlbaum Associates. Available free online through UF Libraries at <http://uf.catalog.fcla.edu/uf.jsp>.

CASE *Currents*. Monthly magazine of the Council on Advancement and Support of Education (CASE) available online at [http://www.case.org/Publications\\_and\\_Products/2015/JanuaryFebruary\\_2015.html](http://www.case.org/Publications_and_Products/2015/JanuaryFebruary_2015.html).

*The Chronicle of Philanthropy*. Bimonthly trade newspaper available online at <http://www.philanthropy.com> (also available at <http://uf.catalog.fcla.edu/uf.jsp>).

Articles from *Currents* will be used for class assignments, and top stories from *The Chronicle* will be discussed regularly. Chapters from the primary text (*EFRM*) are assigned in the “Weekly Course Plan” of this syllabus. Additional assigned readings also are listed. They are available online or will be e-mailed to you. All readings must be **read in advance** of the class dates for which they are listed in the “Weekly Course Plan.” Students also are expected to monitor trade publications and the mass media daily for local and national news related to fundraising, which will be used in class discussions.

## TESTS AND GRADE DISTRIBUTION:

Two **Examinations** will account for a total of 40% of the course grade. Exam I (20%) and Exam II (20%) will be given during class hours in Weeks 7 and 13, respectively, of the semester. The exams will measure students' mastery of content covered in the readings, lectures, and presentations/discussions up to the week it is given. The exams will assess the first two Student Learning Outcomes (SLOs) of the course, which are listed on p. 1 of this syllabus.

A **Research Paper** will account for 25% of the course grade. The paper is due December 6, 2016, and students will give a five-minute oral summary of their paper during the last class session. The paper may be one of two types, depending on students' preferences: (a) a project paper based on research conducted on a charitable organization with which the student is familiar, or (b) a proposal for an academic research study about an important and timely fundraising problem. Both types of papers will be approximately 12 pages in length and include citations of relevant practitioner and scholarly works and a list of References. Both types of papers must have a theoretical basis or framework that is discussed in the paper.

For the project paper, students will analyze a charitable organization's fundraising programs and determine one cultivation, solicitation, or stewardship objective, strategy, and tactic that would be useful to the organization if programming were implemented during 2017 (see handout, “Hierarchy of Fundraising & Public Relations Tactics”). Students may use their own employer organization for the project, if appropriate. Students who are not currently employed by a charitable organization must select one such organization in Gainesville or the nearby area from listings available at GuideStar ([www.guidestar.org](http://www.guidestar.org)). The organization must employ at least one full-time fundraiser (volunteer fundraisers are not acceptable). Students are expected to spend a minimum of 15 hours at the charity's office, interviewing staff members and observing fundraising activities. The time investment is necessary to provide students with first-hand knowledge of fundraising practice in the United States. Completion of the shadowing portion of the project paper will be documented by turning in a form provided by the instructor and signed by the fundraiser shadowed.

The completed project paper will consist of two parts: (a) a written plan that summarizes the research conducted, the objective of the project, the strategy, and the recommended implementation, with emphasis on one tactic critical to achieving the objective; and (b) a prototype of the selected tactic (for example, a proposal to a foundation, a redesigned website, or a special event plan and invitation). Required headings for the paper are as follows:

- Organization Background (description of the organization, including its mission; focus on focal entity if it is part of a larger organization)
- Fundraising Analysis (description of the organization's fundraising programs, including donor types and strategies and tactics used)
- Proposed Objective, Strategy, and Tactic (explanation of why this strategy and tactic would be helpful, an abbreviated review of literature about the use of this strategy and tactic [cite at least 10 reliable sources other than Kelly, 1998])
- Recommended Implementation (description of prototype, timeline in table format, and budget in table format).

*Tests & Grade Distribution Cont.*

The research proposal paper will consist of the first two and one-third sections of a typical research paper: (1) Purpose of the Study, including background of the problem and its timeliness; (2) Review of the Literature, including previous academic studies on the problem and an explanation of the theory selected to guide the study; and (3) Methodology, including descriptions of the method to be used for collecting data and the population selected for study. The proposal must deal with a problem that fundraising practitioners, themselves, believe is important to the practice of fundraising, as evidenced by articles and quotes in the practitioner literature.

All students must submit a “Check-Up Form” on their research paper in Week #12 of the semester.

**As with all written assignments for this course, the tactic project must be typed in 12-point serif font, double spaced on one side of white paper, have one-inch margins, and be stapled (no covers or binders, please). Points will be deducted for spelling, punctuation, syntax, and grammatical errors.**

An **Oral Presentation** will determine 20% of the course grade. The presentation will explore fundraising trends and topics based on articles from CASE *Currents* ([case.org/Publications\\_and\\_Products/](http://case.org/Publications_and_Products/)) and *The Chronicle of Philanthropy* ([philanthropy.com](http://philanthropy.com)). Students will select their top two preferences of topics from a list prepared by the instructor (see “Sign-Up Sheet”). The presentation will last approximately 20 minutes and consist of a PowerPoint® or Prezi® show and at least three questions that will stimulate class discussion. Topics for the Oral Presentation will be finalized by Week #5 of class. A random number generator will be used to decide the order students get to select their topics. Duplication is not allowed. The presentation will be graded on six elements, including demonstrated knowledge of topic and application of class principles (see “Oral Presentation Grading Form” handout). Hard and electronic copies of the show must be respectively handed and e-mailed to the instructor at the start of the presentation and by 12 midnight the same day.

**Class Participation** will account for 10% of the course grade, as determined by such efforts as discussing readings in class and satisfactorily completing satisfactory/unsatisfactory (S/U) assignments, such as reaction papers. Reaction papers are one-page *thought papers* presenting your reaction to the assigned readings. Their purpose is to provide an opportunity to demonstrate that you have thought about and synthesized the reading. The S/U assignments will guide class discussions. They are keyed to specific class sessions in the “Weekly Course Plan” and will *only be accepted* from students attending that specific class session.

The final 5% of the course grade will be based on attending one **Professional Workshop** of the Community Foundation of North Central Florida’s Center for Nonprofit Excellence (CNE; see calendar of events at <http://cfncf.org/center-calendar-of-events/>). To receive credit, students must turn in a one-page, double-space, typed critique of the featured speaker’s presentation with one business card of an attending practitioner stapled to it.

Summarizing, the course grade will be determined on a 100-point scale as follows:

Professional Workshop	5%
Class Participation	10%
Examination #1	20%
Oral Presentation	20%
Examination #2	20%
Research Paper	25%

Grading for the course follows current UF grading policies for assigning grade points (see <http://www.registrar.ufl.edu/catalog/policies/regulationgrades.html>).

Grading Scale: 92-100 = A, 90-91 = A-, 88-89 = B+, 82-87 = B, 80-81 = B-, 78-79 = C+, 70-77 = C, 60-69 = D, 59 or less = E.

**MAKEUPS AND LATE ASSIGNMENTS:**

Course policy dictates that there will be no make-up exams or extensions of deadlines. Dates have been announced in advance in the “Weekly Course Plan” so that students can schedule other activities around these deadlines. Exceptions will be rare and made only in cases of extraordinary, documented circumstances, as determined by the instructor. Any make-up exams administered or late assignments accepted will be graded lower than work turned in on time. No extra credit will be given for additional work.

### **ABSENCES:**

Attendance is mandatory. Each student is allowed two excused absences for the semester, which should be sufficient for illnesses, work conflicts, family crises, etc. Absences beyond two will result in a reduction of the course grade at the rate of one-third grade level for each absence beyond the number permitted. Students are responsible for all class work missed. They should consult with classmates, rather than the instructor, to obtain information on lectures, assignments, and other matters.

### **ACADEMIC HONESTY:**

Students are expected to observe the University of Florida's policy on academic honesty in fulfilling all course requirements. The penalty for violation of academic honesty is an "E" for the course, at minimum.

Academic dishonesty includes the following: extensive use of materials from another author without citation or attribution, extensive use of verbatim materials from another author *with* citation and attribution, and extensive use of one's own writing from past assignments or from assignments in other, current classes (called "double dipping").

UF students are bound by The Honor Pledge, which states: "We, the members of the University of Florida community, pledge to hold ourselves and our peers to the highest standards of honor and integrity by abiding by the Honor Code." On all work submitted for credit, the following pledge is either required or implied: "On my honor, I have neither given nor received unauthorized aid in doing this assignment."

Furthermore, students are obligated to report any condition that facilitates academic misconduct to appropriate personnel.

For more information about the student honor code, violations, and sanctions, go to the Dean of Students Office website at (<http://www.dso.ufl.edu/sccr/process/student-conduct-honor-code/>). If you have any questions or concerns, please consult with the instructor.

### **INTELLECTUAL PROPERTY PROTECTION:**

Lectures given in this course, including handouts and PowerPoint® presentations, are the property of the instructor and the University of Florida. Class lectures may not be recorded in any form without prior permission from the instructor and any guest lecturers that may speak to this class. Recordings, including class notes, may not be used for commercial purposes.

### **CLASSROOM CONDUCT:**

The College of Journalism and Communications is a professional school and professional decorum is expected at all times. This means the instructor and students adhere to workplace norms for collegial and respectful interaction. Students are expected to arrive on time and not leave the classroom until announced breaks or the end of the class.

#### **Diversity:**

All discussions will be ruled by mutual respect—for people and their opinions. Effective fundraising practice is dependent on gathering and understanding diverse viewpoints. Furthermore, professionalism requires an appreciation for the multicultural society and global economy in which students plan to work. Effectiveness in both practice and scholarship relies on an ability to recognize and embrace diversity in all its forms. Throughout the course, students will have opportunities to learn from the information and ideas shared by their classmates.

#### **Other Rules:**

- Cell phones must be turned off during class.
- Photos and other recordings are prohibited unless approved in advance by the instructor.
- Laptops and electronic tablets may be used in class, but will be prohibited if the instructor identifies just one instance of a device being used for non-class purposes.
- Students may only leave the classroom during official breaks (notify the instructor of emergencies).
- Reading unrelated material or talking while others are speaking is prohibited.
- Anyone violating these rules or disrupting class in other ways will be asked to leave the classroom.

*Class Conduct Cont.*

- Students are urged to meet in-person with the instructor if they have questions or are having problems. Traditional and “Virtual” Office Hours are listed on p. 1 of this syllabus. Short conversations immediately following class are welcomed.
- E-mail inquiries to the instructor should be limited to questions that are not answered elsewhere (e.g., the syllabus). Formal composition and clear and concise writing are required. E-mail messages sent at times other than “Virtual Office Hours” generally cannot be answered in less than one day, so plan ahead.
- Telephone calls are encouraged for quick questions (when leaving a voice-mail message, slowly state your name, telephone number, and reason for calling; repeat the phone number).

**ONLINE COURSE EVALUATION**

Students are expected to provide feedback on the quality of instruction in this course based on 10 criteria. These evaluations are conducted online and typically are conducted during the last two weeks of the semester. Time has been allocated in the “Weekly Course Plan” for students to complete their evaluations. Summary results of assessments are available to students at <https://evaluations.ufl.edu/results>.

**STUDENTS WITH DISABILITIES:**

Students requesting classroom accommodation must first register with the Dean of Students Office, which will provide documentation to the student, who must then provide the documentation to the instructor when requesting accommodation. Requests should be made at a private meeting during the instructor’s office hours.

**UF RESOURCES:**

- University counseling services and mental health services: <http://www.counseling.ufl.edu/cwc/Default.aspx> or 392-1575
- University Police Department: 392-1111 or 911 for emergencies.

**STUDENT COMPLAINT PROCESS:**

Information about the process of filing a complaint about a course is available at:

- *Residential Course:* [https://www.dso.ufl.edu/documents/UF\\_Complaints\\_policy.pdf](https://www.dso.ufl.edu/documents/UF_Complaints_policy.pdf)
- *Online Course:* <http://www.distance.ufl.edu/student-complaint-process>.

**FINAL CAVEAT:**

This syllabus is subject to change, as the instructor deems appropriate and necessary.



**WEEKLY COURSE PLAN:**

<i>Week #1</i> August 23	<b>Topics:</b>	Introduction to the Course. Overview of Requirements. Fundraising as a Specialization of Public Relations.
	<b>Assign:</b>	Research Project Paper Students Only: Identify a charitable nonprofit for Research Project Paper.
	<b>S/U Assignment 1:</b>	Survey three individuals about their definition of fundraising or what it is fundraising practitioners do and write a one-page report on findings. Due August 30, 4:05 p.m.
<i>Week #2</i> August 30	<b>Topics:</b>	Findings of Student Surveys. Fundraising as a Specialization of Public Relations cont. Research Paper Q&A. Writing Business Letters.
	<b>Readings:</b>	<i>EFRM</i> , Ch. 1. Mack, Kelly, & Wilson (2016), "Finding an Academic Home for Fundraising: A Multidisciplinary Study of Scholars' Perspectives," <i>International Journal of Nonprofit and Voluntary Sector Marketing</i> (will be emailed to you by Aug. 24).
<i>Week #3</i> Sept. 6	<b>Topics:</b>	Parameters of Fundraising: Nonprofits and Philanthropy. Oral Presentation Assignment.
	<b>Readings:</b>	<i>EFRM</i> , Ch. 2. Read latest edition of <i>The Chronicle of Philanthropy</i> .
<i>Week #4</i> Sept. 13		No Class – Work on Oral Presentation & Research Paper.
<i>Week #5</i> Sept. 20	<b>Topics:</b>	Fundraising Practitioners. Gender Discrimination and Low Representation of Minorities. Professionalism of the Occupation.
	<b>Readings:</b>	<i>EFRM</i> , Chs. 3-4.
	<b>Due:</b>	Selection of Oral Presentation Topic.
	<b>S/U Assignment 2:</b>	Write a one-page reaction paper related to Ch. 5. Due Sept. 27, 4:05 p.m.
<i>Week #6</i> Sept. 27	<b>Topics:</b>	Historical Context of Fundraising. Four Models of Practice. Organizational Context of Fundraising. Four Roles of Practitioners. Review for Exam #1.
	<b>Readings:</b>	<i>EFRM</i> , Chs. 5-6. Memorize Table 5.2: Characteristics of Four Models of Fundraising. Waters, Kelly, & Walker (2012), "Organizational Roles Enacted by American Healthcare Fundraisers," <i>Journal of Communication Management</i> (available through UF Libraries).
<i>Week #7</i> Oct. 4 5:45 p.m.	<b>EXAMINATION:</b>	<b>Exam I – 4:05 – 5:30 p.m.</b>
	<b>Topics:</b>	Legal Context of Fundraising:
	<b>Readings:</b>	<i>EFRM</i> , Ch. 7.
	<b>S/U Assignment 3:</b>	Identify a news item (clipping or video) about illegal or unethical behavior in fundraising and bring to class for discussion on Oct. 11.

*Weekly Course Plan Cont.*

*Week #8*

Oct. 11      **Topics:**                      Exam #1 Results. Ethical Context of Fundraising. Oral Presentations Q&A.  
**Readings:**                      *EFRM*, Ch. 8. Browse [www.charitynavigator.org](http://www.charitynavigator.org).

*Week #9*

Oct. 18      **Topics:**                      Theoretical Context of Fundraising. Oral Presentations Q&A.  
**Readings:**                      *EFRM*, Ch. 9.  
Kelly (2002), “The State of Fund-Raising Theory and Research” (e-mailed by Oct. 11).

*Week #10*

Oct. 25      **Topics:**                      Oral Presentations on Fundraising Trends/Issues (6-8 students).

*Week #11*

Nov. 1      **Topics:**                      Oral Presentations cont. (3-5 students). Research Paper Assignment.  
ROPEs: The Fundraising Process.  
**S/U Assignment 4:**              Complete Research Paper Check-Up Form. Due Nov. 8.

*Week #12*

Nov. 8      **Topics:**                      ROPEs cont. Review for Exam #2.  
**Readings:**                      *EFRM*, Ch. 10. Memorize ROPEs Handout.  
**Due:**                              Completed Research Paper Check-Up Form, 4:05 p.m.

*Week #13*

Nov. 15      **EXAMINATION:**              **Exam II – 4:05 – 5:30 p.m.**  
**Topics:**                      Annual Giving. Major Gifts.  
**Readings:**                      *EFRM*, Chs. 11-12.  
6 p.m.      **Guest Speaker:**              Matthew Hodge, Sr. Assistant VP of Development, UF Foundation.

*Week #14*

Nov. 22      **Topics:**                      Exam #2 Results. Career Advice & Salary Negotiation. Research Paper Q&A.

*Week #15*

Nov. 29      **Topics:**                      Course Evaluations. Catch-Up. Planned Giving. Capital Campaigns.  
**Readings:**                      *EFRM*, Chs. 13-14.  
**Due:**                              Last day to turn in CNE Professional Workshop Critique, and, if applicable, Shadowing Completion Form.  
5 p.m.      **Guest Speakers:**              Paul Caspersen, Executive Director of Gift Planning, UF Foundation;  
& Joe Mandernach, Associate Vice President, UF Foundation.

*Week #16*

Dec. 6      **Topics:**                      Oral Summaries (5 min.) of Research Papers. End-of-Semester Celebration.  
**Due:**                              Research Paper.

*Have a Good Holiday Break!*