

Department of Public Relations
College of Journalism and Communications
UNIVERSITY OF FLORIDA ON ZOOM

2023 Spring Semester
T – Period 3 and 4; TH -- Period 4

SYLLABUS PUR 4410 — PRINCIPLES OF FUNDRAISING

Instructor: Debbie Mason, CFRE, APR, CPRC, Fellow PRSA
Office Hours: Remote - by appointment – mason.d.@ufl.edu
Phone Number – 954-480-7814

COURSE DESCRIPTION:

PUR 4410 — Principles of Fund Raising reviews the public relations specialization of fundraising — the high demand, low supply profession unique to the charitable nonprofit subsector.

Prerequisites: PUR 3000, PUR 3500.

COURSE FORMAT:

The course consists of lectures by professor, guest speakers, interactive discussions, readings and a shadowing experience. Guest speakers will join the class to demonstrate how scholarly principles are related to the professional practice of fundraising. Students will spend 15 hours outside of class shadowing a fundraiser at a local charitable organization. Students will engage in a team presentation. High student interaction is expected.

COURSE GOALS:

The overall goal of this professional elective course is to prepare students for career positions in fundraising. The course enables students to gain an understanding of:

- (1) Fundraising as a specialization of public relations and 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,
 - theory of fundraising practitioner roles, and specializations within the sector
 - primary programs of annual giving and major gifts, and tactics to implement those
 - underlying communications principles for effective fundraising

COURSE OBJECTIVES:

This course adheres to the College of Journalism and Communications' objectives.

The Accrediting Council on Education in Journalism and Mass Communications requires that by graduation all students should be able to:

- apply the principles and laws of freedom of speech and press, in a global context, and for the country in which the institution that invites ACEJMC is located;

- demonstrate an understanding of the multicultural history and role of professionals and institutions in shaping communications;
- demonstrate culturally proficient communication that empowers those traditionally disenfranchised in society, especially as grounded in race, ethnicity, gender, sexual orientation and ability, domestically and globally, across communication and media contexts;
- present images and information effectively and creatively, using appropriate tools and technologies;
- write correctly and clearly in forms and styles appropriate for the communications professions, audiences and purposes they serve;
- demonstrate an understanding of professional ethical principles and work ethically in pursuit of truth, accuracy, fairness and diversity;
- apply critical thinking skills in conducting research and evaluating information by methods appropriate to the communications professions in which they work;
- effectively and correctly apply basic numerical and statistical concepts;
- critically evaluate their own work and that of others for accuracy and fairness, clarity, appropriate style and grammatical correctness;
- apply tools and technologies appropriate for the communications professions in which they work.

COURSE TEXTS:

Required: Shaker, Genevieve G., et. al. (2020). *Achieving excellence in fundraising* (5th ed.). Hoboken, NJ: John Wiley & Sons, Inc. Available on Amazon. (ACE)

Required: VanHuss, Katrina, et.al. (2023) *Social fundraising: Mining the new peer-to-peer landscape*. Independently published. Available on Amazon. (SF)

Required: *The Chronicle of Philanthropy* – online at <https://www.chronicle.com/>.

Note, the professor has arranged a discounted subscription rate of \$28.99 which will be coordinated the first week of class for all students.

Required: *The Nonprofit Quarterly* – online at <https://www.nonprofitquarterly.org>

Note, the professor has arranged a complimentary subscription which will be coordinated the first week of class for all students. Stories from *The Chronicle* and *The Nonprofit Quarterly* will be discussed regularly. Chapters from the textbooks are assigned in the “Weekly Course Plan” of this syllabus.

Additional assigned readings will be emailed to you as either pdf or as an online link. All readings must be **read in advance** of the class dates for which they are listed. Students also are expected to monitor trade publications and the mass media for local, national, and international news related to fundraising, which will be used in class discussions.

GRADE DISTRIBUTION:

A **Semester Examination** will be given in Week #11 of the semester. It will measure students' understanding of the principles and process of fundraising through the assigned readings, speakers, and activities. It will account for 35% of the course grade.

A **Shadowing/Tactic Project** will account for 35% of the course grade. At the beginning of the semester, students will select one charitable nonprofit organization in Gainesville or the nearby area from listings available at GuideStar (www.guidestar.org).

The organization must employ at least one full-time fundraiser (volunteer fundraisers are not acceptable). The names of the selected charity and fundraiser, as well as the fundraiser's organizational title, email address, and telephone number, are due Week #3 of class.

Once the instructor has approved selections (required), students must obtain approval from the fundraiser. A business letter to the fundraiser confirming participation and an agreed-upon "work" schedule must be sent via USPS by the end of January, with a hard copy of the letter submitted to the instructor. Students will spend a minimum of 15 hours at the charity's office, interviewing staff members and observing fundraising activities. Completion of the shadowing portion of the project will be documented by turning in a form signed by the fundraiser (professor will distribute the Shadowing Form handout).

Based on their shadowing experience, students will produce a project paper of four to five pages that is due Week #16 of class. Students will analyze the organization's fundraising programs and determine one solicitation, cultivation, or stewardship tactic that would be useful to the organization if implemented during the current year. The completed project will consist of one prototype of a written or audio-visual communication tactic (for example, a direct-mail packet, a redesigned website, or a special event plan and invitation, social fundraising plan and concept outline) and a written plan that summarizes the research conducted, the tactic's objective, and the recommended implementation.

Required headings for the paper are as follows:

- Organization Background (description of the organization, including its mission; focus on local entity if it is part of a national organization.)
- Fundraising Analysis (description of the organization's fundraising programs, including donor types and tactics used.)
- Proposed Tactic (explanation of why this tactic would be helpful – the objective for implementing it; abbreviated review of literature about the use of this tactic [cite at least three published sources.]
- Recommended Implementation (description of prototype, timeline in table format, and budget in table format.)

As with all written assignments for this course, the tactic project paper must be typed in 12-point Ariel font, double spaced, have one-inch margins, and be emailed as a word document by the date listed. All assignments must be submitted before the official start of class time. Points will be deducted for spelling, punctuation, syntax, and grammatical errors and for late submissions.

An oral **Team Presentation** will determine 20% of the course grade. The presentation will examine fundraising topics based on articles from *The Chronicle of Philanthropy* (philanthropy.com) or *The Nonprofit Quarterly*. (nonprofitquarterly.org). Students will organize themselves into five teams of four to five members (depending on class size) and select the team's top two preferences of topics from a list prepared by the instructor. The presentation will last approximately 30 minutes and consist of a PowerPoint® or Prezi® show with each team member lecturing for approximately six minutes on a component of the topic.

Teams and topics for the Team Presentation will be finalized by Week #7 of class. The presentation will be graded on key elements, and peer evaluations will be used to assign grades to individual members.

Class Participation will account for 10% of the course grade, as determined by such efforts as discussing readings in class, satisfactorily completing satisfactory/unsatisfactory (S/U) assignments and asking questions regarding presentations.

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

Class Participation	10%
Team Presentation	20%
Semester Exam	35%
Shadowing/Tactic Project	35%

Grading for the course follows current UF grading policies for assigning grade points (see <https://catalog.ufl.edu/UGRD/academic-regulations/grades-grading-policies/#gradetext>)

Grading Scale: 93-100 = A, 90-92 = A-, 87-89 = B+, 83-86 = B, 80-82 = B-, 77-79 = C+, 73-76 = C, 70-72 = C-, 67-69 = D+, 63-66 = D, 60-62 = D-, 59 or less = E.

ABSENCES:

Attendance is mandatory. Each student is allowed one excused absence for the semester, which should be sufficient for illnesses, transportation problems, family crises, university-sponsored activities, etc. Excused absences should be submitted in advance unless it is a true emergency. Absences beyond two will result in a reduction of the course grade at the rate of one-third grade level for each absence. 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.

MAKEUPS AND LATE ASSIGNMENTS:

Policy of the course is 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.

TECHNICAL ASSISTANCE

Technical assistance accessing the Zoom course or any of the University's systems should be resolved with the UF helpdesk reached at <https://helpdesk.ufl.edu> or by calling 352-392-4357.

ACADEMIC DISHONESTY:

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.”

As part of the honor code, students are obligated to report any condition that facilitates academic misconduct to appropriate personnel. For more information about the student honor code, the Conduct 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. Students are allowed to record video of audio of class lectures. However, the purposes for which these recordings are used are strictly controlled. The only allowable purposes are 1) for personal use, 2) in connection with a complaint to the university, or 3) as evidence in or preparation for, a criminal or civil proceeding. All other purposes are prohibited. Specifically, students may not publish recorded lectures without the written consent of the instructor.

A “class lecture” is an educational presentation intended to inform or teach enrolled students about a particular subject, including any instructor-led discussions that form part of the presentation, and delivered by any instructor hired or appointed by the University, or by a guest instructor, as part of a University of Florida course. A class lecture does not include lab sessions, student presentations, clinical presentations such as patient history, academic exercises involving solely student participation, assessments (quizzes, test, exams), field trips, private conversations between students in the class or between a student and the faculty or guest lecturer during a class session.

Publication without permission of the instructor is prohibited. To “publish” means to share, transmit, circulate, distribute, or provide access to a recording, regardless of format or medium, to another person (or persons), including but not limited to another student within the same class section. Additionally, a recording, or transcript of a recording, is considered published if it is posted on or uploaded to, in whole or in part, any media platform, including but not limited to social media, book, magazine, newspaper, leaflet, or third party note/tutoring services. As student who publishes a recording without written consent may be subject to a civil cause of action instituted by a person injured by the publication and/or discipline under UF Regulation 4.040 Student Honor Code and Student Conduct Code.

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.
- Students may only leave the classroom zoom 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.
- Students are urged to meet in-person with the instructor and/or teaching assistant if they have questions or are having problems. Office hours are by appointment.
- Email inquiries to the instructor and teaching assistant should be limited to questions that are not answered elsewhere (e.g., the syllabus). Formal composition and clear and concise writing are required. Email messages generally cannot be answered in less than one day, so plan ahead.
- Phone calls are to be used for emergency situations only. Please leave a clear voice mail slowly speaking name and phone number for a return call.

ONLINE COURSE EVALUATION

Students are expected to provide professional and respectful feedback on the quality of instruction in this course by completing course evaluations online via GatorEvals.

Guidance on how to give feedback in a professional and respectful manner is available at <https://gatorevals.aa.ufl.edu/students/>. Students will be notified when the evaluation period opens, and can complete evaluations through the email they receive from GatorEvals, in their Canvas course menu under GatorEvals, or via <https://ufl.bluer.com/ufl/>. Summaries of course evaluation results are available to students at <https://gatorevals.aa.ufl.edu/public-results/>.

Time has been allocated in the “Weekly Course Plan” for students to complete their evaluations.

STUDENTS WITH DISABILITIES

Students with disabilities who experience learning barriers and would like to request academic accommodations should connect with the disability Resource Center. Visit <https://disability.ufl.edu/get-started/> to get started. It is important for students to share their accommodation letter with their instructor and discuss their access needs, as early as possible in the semester.

U MATTER, WE CARE INFORMATION

Your well-being is important to the University of Florida. The U Matter, We Care initiative is committed to creating a culture of care on our campus by encouraging members of our community to look out for one another and to reach out for help if a member of our community is in need. **If you or a friend is in distress, please contact umatter@ufl.edu so that the U Matter, We Care Team can reach out to the student in distress.**

A Counseling and Wellness Center counselor is available by phone at 352-392-1575 for non-crisis and crisis services Student Health Care Center can be reached at 352-392-1161. UF Health Shans Emergency Room/Trauma Center can be reached at 352-733-0111 or in person at 1515 SW Archer Road. Wellness Coaching for Academic Success can be reached at the GatorWell website or by 352-273-4450.

Please remember that asking for help is a sign of strength. **In case of emergency, call 9-1-1. University Police Department: 352-392-1111.**

STUDENT COMPLAINT PROCESS:

Information about the process of filing a complaint about a course is available at: <https://flexible.dce.ufl.edu/student-complaints/>.

FINAL CAVEAT:

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

Weekly Course Plan follows this – please see additional pages.

Principles of Fundraising Weekly Course Plan:

Week 1 January 9/11	Topics: Assignments: Instructor will submit names for discounted and free subscriptions to required publications.	Introduction to the course. Overview of requirements, Fundraising as a specialization of public relations. Explain Shadowing Tactical Project. Provide overview of fundraising as a profession. 1.Survey three individuals about their definition of fundraising and what fundraising professionals do. Type up one-page report of findings. Due January 16 for before class starts. 2.Identify a charitable nonprofit for the Shadowing Tactical Project. Selected organization and the fundraiser's contact information is due on January 23 before class starts. NOTE: professor will review for duplications and discussion. 3. Write and mail a business letter you prepare to the fundraiser at your selected organization and submit a copy to professor – both are due by January 30. Readings: Browse www.guidestar.org and the Florida Nonprofit Alliance https://flnonprofits.org
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<p>Week 2 January 16/18</p>	<p>Topic:</p> <p>Readings:</p> <p>Guest speaker:</p> <p>Due and New Assignments:</p>	<p>The Economic Impact of the Nonprofit Sector. Theory, ethics and legalities of fundraising, context for fundraising and fundraising across sectors.</p> <p>Read <i>Achieving Excellence in Fundraising</i> (ACE) pages 1 through 89.</p> <p>Guest speaker Ms. Sabeen Perwalz on the Economic Impact of Nonprofit Sector in Florida.</p> <p>Due – Write up on fundraising interviews is due January 16. New - 1. Identify a global or cross cultural nonprofit in the social justice, advocacy or social change space, write up a one page summary of the organization and why it is relevant and send to professor by January 23. 2. Go online and access the free and discounted subscriptions of required publications and peruse.</p>
<p>Week 3 January 23/25</p>	<p>Topics:</p> <p>Readings:</p> <p>Guest Speaker</p> <p>Due and New Assignments:</p>	<p>Global philanthropy and cross cultural fundraising, advocacy, social justice and social change fundraising. Representation of minorities and genders as donors and fundraisers. Social Fundraising – donors and their motivations.</p> <p>Read <i>ACE</i> pages 91 through 111, and Tables 29.1 and 29.2 on page 541 on giving by race. Read <i>SF</i> pages 1-52. Articles to be provided by professor.</p> <p>Guest speaker to be announced.</p> <p>1.Due - Selected local nonprofit organization and the fundraiser's contact information January 23. 2.Global, cross-cultural nonprofit write up due January 23. New - Identify and send by Feb. 1, a news article or video about illegal or unethical fundraising by an individual or organization.</p>
<p>Week 4 January 30/February 1</p>	<p>Topics:</p> <p>Readings:</p> <p>Guest speaker:</p> <p>Due and New Assignments:</p>	<p>Historical Context of Fundraising and Models of Practice. Design choices about social impacts on constituent relations.</p> <p>Read <i>SF</i> pages 27-106. Review <i>ACE</i>, chart 18.1. page 208. Articles to be provided by professor.</p> <p>Guest speaker to be announced.</p> <p>Due - Copy of letter you sent to the fundraiser at selected organization for Shadowing Tactical Project due January 30. Article/video re- illegal or unethical fundraising due Feb. 1. New – Article of video about highly successful fundraising program or tactic by an organization, due by Feb. 6.</p>

<p>Week 5 February 6/8</p>	<p>Topics:</p> <p>Readings:</p> <p>Guest speaker:</p> <p>Due and New Assignments:</p>	<p>Organizational foundation for effective fundraising, roles of practitioners. Donor centric messages.</p> <p><i>ACE</i> pages 115 to 203. <i>SF</i> pages 117-160.</p> <p>Guest speaker to be announced.</p> <p>Due – A news article/video about successful fundraising program or tactic by an organization due February 6. New – Find an example of a successful social fundraising campaign and submit link to professor with one page observations of strengths and weaknesses by February 15.</p>
<p>Week 6 February 13/15</p>	<p>Topics:</p> <p>Readings:</p> <p>Guest speaker:</p> <p>Due and New Assignments:</p>	<p>The fundraising team – management, leadership, board and volunteers.</p> <p><i>ACE</i> pages 207-253. <i>SF</i> pages 179 -203.</p> <p>Guest speaker to be announced.</p> <p>Due – Example of a successful social fundraising campaign and one page observations due February 15. New - Form your team and select your topic for the team presentation in week 12 and 13. Team lists due February 22.</p>
<p>Week 7 February 20/22</p>	<p>Topics:</p> <p>Readings:</p> <p>Guest speaker:</p> <p>Due and New Assignments:</p>	<p>Fundraising programs to build donor base. Social fundraising with social media.</p> <p><i>ACE</i> pages 257-303. <i>SF</i> pages 135-178.</p> <p>Guest speaker to be announced.</p> <p>Due - Team lists with names of members and the selected topics for presentation are due February 22.</p>
<p>Week 8 February 27/29</p>	<p>Topics:</p> <p>Readings:</p> <p>Guest speaker:</p> <p>Due and New Assignments:</p>	<p>The theoretic context of fundraising. Understanding and engaging diverse individual donors. Maintaining momentum in social fundraising.</p> <p>Articles to be provided by professor. <i>ACE</i> pages 307-378. <i>SF</i> 227-242.</p> <p>Guest speaker to be announced.</p> <p>None- prepare for course examination and team presentations.</p>

Week 9 March 5/7	<p>Topics:</p> <p>Readings:</p> <p>Guest speaker:</p> <p>Due and New Assignments:</p>	<p>ROPES as a fundraising process. Strategies for major gift fundraising and institutional gifts. Role of grantmaking foundations and donor advised funds.</p> <p><i>ACE</i>, pages 381-462. Articles to be provided by professor.</p> <p>Barzella Papa, President, Community Foundation of North Central Florida on March 5th.</p> <p>March 7th – Review examination preparation highlights.</p> <p>None - Prepare for course examination and team presentations.</p>
Week 10	No Class Spring Break	No Class
Week 11 March 19/22	<p>Topics:</p> <p>Readings:</p> <p>Due and New Assignments:</p>	<p>Semester Examination Class One. Discuss shadowing Tactical Project Paper, Class Two.</p> <p><i>The Chronicle of Philanthropy.</i></p> <p>None – prepare for team presentations.</p>
Week 12 March 26/28	<p>Topics:</p> <p>Readings:</p> <p>Due and New Assignments:</p>	<p>Team Presentations</p> <p><i>Nonprofit Quarterly</i></p> <p>Due - Completed team evaluation form.</p>
Week 13 April 2/4	<p>Topics:</p> <p>Readings:</p> <p>Due and New Assignments:</p>	<p>Team Presentations</p> <p>Articles to be provided by professor.</p> <p>Due – 1. Completed Shadowing Project Form signed by fundraiser due before start of class on April 4th. 2. Completed team evaluation form.</p>
Week 14 April 9/11	<p>Topics:</p> <p>Readings:</p> <p>Guest speaker:</p> <p>Due and New Assignments :</p>	<p>Career options and paths in professional fundraising.</p> <p>Articles to be provided by professor.</p> <p>Guest speaker to be announced.</p> <p>Research and submit one possible internship or professional fundraising position of interest by April 16.</p>

<p>Week 15 April 16/18</p>	<p>Topics:</p> <p>Readings:</p> <p>Guest speaker:</p> <p>Due and New Assignments:</p>	<p>Career options and paths in professional fundraising. Last questions about Shadowing Tactical Project Reports.</p> <p>Articles to be provided by professor.</p> <p>Guest speaker to be announced.</p> <p>Submit one possible internship or professional fundraising position of interest – due April 16.</p> <p>No new – work on Shadowing Tactical Project Reports.</p>
<p>Week 16 April 23 – last class</p>	<p>Topics:</p> <p>Assignments Due:</p>	<p>Wrap up items. Bateman Team Presentation.</p> <p>Submit Shadowing Project Tactical Paper.</p>

