Purpose of the Course:

This course is intended to provide a theoretical framework and academic underpinning for students interested in working in a development or advancement office at a university. Specifically, this course will be a required experience for students at the University of Michigan participating in the Development Summer Internship Program (D-SIP).

Overview:

Development and advancement operations are occupying an increasingly important and visible role in higher education institutions. Once the purview of private institutions, public institutions have built sophisticated fundraising operations to cultivate private support in the wake of decreased public funding. The University of Michigan is arguably a “leader and the best” in these functions.

While educated, talented and dedicated professionals occupy these roles, they enter the field from a variety of routes without a dedicated academic training. Given the emergence of the profession, research and literature have developed to provide a theoretical context. While academic programs have also been developed recently, many are at the graduate level and the field by nature does require a certain level of “learning by doing.” This course is an attempt to merge the academic with the experiential and in doing so to continue the groundbreaking educational and program offerings that have become the hallmark of Michigan.

As an interdisciplinary effort, development draws upon bodies of knowledge that cut across the humanities and social sciences, business and law. While some principles apply to the field of fundraising in general and typical aspects of the nonprofit sector, this course will specifically focus on development and advancement in higher education. The relationship between these areas is broad:
• Philanthropy has historically played a significant role in higher education and its importance continues to grow. Aside from religion, education represents the next highest sector for all charitable giving.
• U-M has been a pace-setting institution for private funding and has a rich history of volunteerism and community engagement.
• Fundraising topics cover the key challenges facing higher education:
  o Scholarships and financial aid—access and preferences
  o Donor intent and involvement—ethical issues
  o Corporate support—issues of marketing and branding
  o Foundations—staying true to mission
  o Changing roles of administrators and faculty
  o Alumni—roles, power, events
• Development is an increasingly specialized and diversified field, with many roles not even directly involved in front-line fundraising.
  o Development employs its own staff of researchers, grant writers, and communications professionals, for example.
• Development provides an opportunity for interactions with all constituents of the university—alumni, staff, administrators and faculty.
• While students might not want to pursue a career in fundraising, an understanding of the field is increasingly important not only for future administrators but also faculty members.

Course Objectives:

This course will build upon the internship experience in several ways:

1) Students will gain an understanding of the role philanthropy has historically played in the development of higher education institutions in America.

2) Using this historical knowledge, students will learn to place current issues, challenges and trends—such as privatization of public supported institutions—in context.

3) Individual and organizational motivations, methods and related implications will be explored, as will related ethical and legal considerations. In addition to studying this in a general sense, you will also be challenged to discover your own “philanthropic passion” and to understand the impact your resources (even if that’s not yet money but time) can have.

4) The organizational structure of development and advancement operations within universities will be analyzed. Students will be able to share their internship experiences and place their positions and offices within the bigger picture of serving the university and its various constituents.

5) Students will explore the basic literature for the theory and practice of fundraising in higher education and will determine implications for future research.
Course Structure:

This course will employ a variety of instructional methods including lecture, guest speakers, small and large group discussion, student reporting, individual research and written assignments to demonstrate an understanding of the material.

Particularly since several faculty members and professional administrators will be sharing their time and experiences with the class, it is critical that you not only are present for each class but prepared, attentive, respectful and engaged. **Cell phones nor laptops should be used during class.**

Assignments, Readings and Grades:

You will assemble a coursepack of materials throughout the class as articles are distributed (via the C-Tools site primarily) for review and discussion. Some readings are noted in the syllabus; others will be assigned as necessary (replacing and or supplementing the printed schedule).

We will be reading excerpts from a book that is highly recommended, especially if you are considering a career in university development: Worth, M. J. (2002). *New strategies for educational fund raising*. Westport, CT: ACE/Prager Publishers.

The course will use a variety of assignments that will allow you to draw upon your internship experiences, to share those ideas with the class, to position them in a greater context, and thus to gain a broader understanding of the field. To reiterate, class participation is essential not only as a courtesy to our guest speakers but also to each other as you will often be representing your school or unit to your classmates.

—Class participation will constitute 10% of your grade.
—The philanthropy profile will count for 20%.
—A strategic messaging memo will determine 20%.
—A final presentation will count for 20%.
—The remaining 30% will be determined by the quality of your final project/portfolio. The instructor will consult with your internship supervisors, and this assignment will take into account your unique experiences and responsibilities.
Weekly Topics, Presenters, Readings & Assignments:
(May 14–First class meeting for syllabus review, initial discussions, & philanthropic campus tour)

**MAY 21  HISTORY OF PHILANTHROPY & HIGHER EDUCATION (HE)**
- General overview (We will revisit the state of HE philanthropy, particularly in relation to different groups, throughout the summer)
- Why support HE? Public institutions? Build an endowment?
- Role of nonprofits in society. Compare/contrast to higher education.
- Development Functions (Methods/Vehicles) & Organizational Structure—Overview

**READINGS:**


**MAY 28  ANNUAL GIVING**
- More exploration of higher education development and philanthropy
- The importance of annual support and giving participation
- Annual Giving—the intersection of public relations/marketing and development
- Different Donor Groups: alumni, parents, athletic boosters, arts patrons, grateful patients, etc.

- Guest speaker: Ray Aldrich

**READINGS:**


CLASS PREP: Annual Giving Appeal Analysis—If possible, bring in a letter, brochure, email, etc., that your school/college/unit uses as part of its annual giving program and come prepared to share it with the class, including its success rate and your critique of its effectiveness. If your work unit does not have such an appeal, consider using something from a student group you’re involved with, a nonprofit you support, or your major’s/school’s online appeal (and consider what might be used if none exists). What you learn here will factor into the strategic messaging memo.

JUNE 4  DONOR MOTIVATIONS / THE ROLE OF VOLUNTEERS IN DEVELOPMENT
- The relationship between volunteerism and giving
- Volunteer management
- Negotiating the role of volunteers—confidentiality, level of involvement, ethical considerations and legal responsibilities
- Motivations for Philanthropists: Why do people give? Are there differences by gender, age, etc?

- Guest Speaker & Luncheon: Molly Dobson

READINGS:
Excerpts from


ASSIGNMENT DUE: Philanthropist Profile (separate instructions provided)

JUNE 11  DONOR-CENTERED DEVELOPMENT
- Gifts as Partnerships
- Development as a Strategic Enterprise
- Campaign overview: purpose and rationale
- Aligning academic priorities with funding opportunities

- Guest Speakers: David Brandon
  Jerry May

READINGS:


**JUNE 18  THE ROLE OF PRIVATE SUPPORT & CAMPAIGNS AT U-M**

- Making the case for private support of a public institution
- Donor visits/calls
- The relationship between public and private funding
- Endowment overview
- Administrator and faculty roles in fundraising

- Guest Speakers: Provosts Teresa Sullivan and Phil Hanlon
  Menakka Bailey

**READINGS:**


*U-M Response to the Senate Finance Committee* (2008)


**JUNE 25  MAJOR GIFTS**

- Reviewing the donor pipeline
- Piecing together motivations for giving, research, involvement, engagement
- Solicitation as a small part of an ongoing process
- The importance of stewardship and ongoing donor communications

- Special Role Playing Exercise facilitated by Colleen Zimmerman and other gift officers

**READINGS:**

Excerpts from:


ASSIGNMENT DUE: Strategic Messaging Memo (separate instructions provided)

**JULY 2—CREATING & LEAVING A LEGACY**

- Key planned giving concepts
  - Guest Speaker: Joel Tauber

**READING:**


**JULY 9 ** ORGANIZATIONAL PHILANTHROPY / THE PHILANTHROPIC CLIMATE

- Foundations: Private, Community, Operating & Family Funds
- Corporate Giving: Foundations, Sponsorships & Social Marketing
- Market Forces Impacting Philanthropy
- Implications of the impending intergenerational transfer of wealth
- The Public Policy Context
  - Guest Speakers: Rob Collier
  - Curtis Mack

**READINGS:**


**JULY 16 ** BUILDING LIFELONG RELATIONSHIPS

- Alumni relations
- Ethical actions and responsibilities
- Policies & procedures, gift contracts, donor recognition, and naming opportunities
- The importance of prospect management, data and research
  - Special Luncheon Panel: A2 Nonprofit Leaders on the Impact of Local NPOs on the Community

**READINGS:**


JULY 23 CLASS UP NORTH!
- Call Report Exercise & Debriefing on donor events
- Guest Speakers: Chrissi Rawak
  Kim Gattle

JULY 30 DEVELOPMENT AS A PROFESSION; PHILANTHROPY AS A FIELD
- Diversity & Internationalization
- Academic Study: State of the field and research
- Professional Development

READINGS:


AUGUST 6 FINAL PRESENTATIONS