RUTGERS, THE STATE UNIVERSITY OF NEW JERSEY
SCHOOL OF SOCIAL WORK

COURSE OUTLINE

19:910:541:91 Fundraising and Marketing

Instructor:
Office hours:
Telephone:
Email:

I. Catalog Course Description
This course provides an introduction to current strategies and procedures for identifying, obtaining, and maintaining a diverse portfolio of nonprofit funding sources. The course also reviews methodologies for packaging, marketing, and selling program proposals to donors and other funders.

II. Course Overview
The purpose of this course is to help students understand the marketing and fundraising challenges facing nonprofits in today’s economy. The focus will be on developing and implementing comprehensive marketing and fundraising strategies using ethically-based approaches, making a case for the marketing and funding of nonprofits, and developing initiatives for sustainable enterprise and fundraising in an era of increasing demographic, “value,” and attitude diversity. Social work values and ethics will be applied to the context of fundraising, as will ethics endorsed by professional fundraisers.

III. Place of Course in Program
Course 19:910:541 is an advanced practice elective, open to Advanced Clinical Practice and Management and Policy students. Satisfactory completion of the Professional Foundation courses is a prerequisite.

IV. Program Level Learning Goals and the Council of Social Work Education’s Social Work Competencies

The MSW Program at Rutgers is accredited by the Council on Social Work Education (CSWE). CSWE’s accreditation standards can be reviewed at www.cswe.org.

In keeping with CSWE standards, the Rutgers School of Social Work has integrated the CSWE competencies within its curriculum. These competences serve as program level Learning Goals for the MSW Program and include the following. Upon completion of their MSW education students will be able to: demonstrate ethical and professional behavior; engage in diversity and difference in practice; advance human rights and social, economic and environmental justice; engage in practice informed research and research informed practice; engage with individuals, families, groups organizations and communities; intervene with individual, families, groups organizations and communities; and evaluate practice with individuals, families, groups, organizations and communities.
This course will assist students in developing the following competencies:

Competency 6: Engage with individuals, families, groups, organizations, and communities; Competency 7: Assess individuals, families, groups, organizations, and communities; Competency 8: Intervene with individuals, families, groups, organizations, and communities. The definitions for each are listed at the end of this syllabus.

**Competency 6: Engage with Individuals, Families, Groups, Organizations, and Communities**

Social workers understand that engagement is an ongoing component of the dynamic and interactive process of social work practice with, and on behalf of, diverse individuals, families, groups, organizations, and communities. Social workers value the importance of human relationships. Social workers understand theories of human behavior and the social environment, and critically evaluate and apply this knowledge to facilitate engagement with clients and constituencies, including individuals, families, groups, organizations, and communities. Social workers understand strategies to engage diverse clients and constituencies to advance practice effectiveness. Social workers understand how their personal experiences and affective reactions may impact their ability to effectively engage with diverse clients and constituencies. Social workers value principles of relationship-building and inter-professional collaboration to facilitate engagement with clients, constituencies, and other professionals as appropriate. Social workers:

- apply knowledge of human behavior and the social environment, person-in-environment, and other multidisciplinary theoretical frameworks to engage with clients and constituencies; and
- use empathy, reflection, and interpersonal skills to effectively engage diverse clients and constituencies.

**Competency 7: Assess Individuals, Families, Groups, Organizations, and Communities**

Social workers understand that assessment is an ongoing component of the dynamic and interactive process of social work practice with, and on behalf of, diverse individuals, families, groups, organizations, and communities. Social workers understand theories of human behavior and the social environment, and critically evaluate and apply this knowledge in the assessment of diverse clients and constituencies, including individuals, families, groups, organizations, and communities. Social workers understand methods of assessment with diverse clients and constituencies to advance practice effectiveness. Social workers recognize the implications of the larger practice context in the assessment process and value the importance of inter-professional collaboration in this process. Social workers understand how their personal experiences and affective reactions may affect their assessment and decision-making. Social workers:
• collect and organize data, and apply critical thinking to interpret information from clients and constituencies;
• apply knowledge of human behavior and the social environment, person-in-environment, and other multidisciplinary theoretical frameworks in the analysis of assessment data from clients and constituencies;
• develop mutually agreed-on intervention goals and objectives based on the critical assessment of strengths, needs, and challenges within clients and constituencies; and
• select appropriate intervention strategies based on the assessment, research knowledge, and values and preferences of clients and constituencies.

Competency 8: Intervene with Individuals, Families, Groups, Organizations, and Communities

Social workers understand that intervention is an ongoing component of the dynamic and interactive process of social work practice with, and on behalf of, diverse individuals, families, groups, organizations, and communities. Social workers are knowledgeable about evidence-informed interventions to achieve the goals of clients and constituencies, including individuals, families, groups, organizations, and communities. Social workers understand theories of human behavior and the social environment, and critically evaluate and apply this knowledge to effectively intervene with clients and constituencies. Social workers understand methods of identifying, analyzing and implementing evidence-informed interventions to achieve client and constituency goals. Social workers value the importance of inter-professional teamwork and communication in interventions, recognizing that beneficial outcomes may require interdisciplinary, inter-professional, and inter-organizational collaboration. Social workers:

• critically choose and implement interventions to achieve practice goals and enhance capacities of clients and constituencies;
• apply knowledge of human behavior and the social environment, person-in-environment, and other multidisciplinary theoretical frameworks in interventions with clients and constituencies;
• use inter-professional collaboration as appropriate to achieve beneficial practice outcomes;
• negotiate, mediate, and advocate with and on behalf of diverse clients and constituencies; and
• facilitate effective transitions and endings that advance mutually agreed-on goals.

Assessment of Competencies/Program Level Learning Goals: Please note that this course focuses on providing you with the knowledge, skills, and values for you to engage in advanced management and planning practice, and thus it is an important elective in the MAP curriculum. Accordingly, two of the course assignments, the Midterm Marketing Plan and the Final Fundraising Plan have been designed to assess your attainment of these competencies.
V. Course Learning Goals

Course level learning goals primarily relate to the aforementioned competencies/program level learning goals as the course addresses policy analysis skills and competencies as well as addresses human rights and social, economic and environmental justice through the study of the evolution of the US welfare state and the emergence of the social work profession. (Note: Faculty, please add brief statement that highlights the alignment of the course learning goals with the competencies/program level learning goals above)

Upon completion of this course, students will be able to: (Note: Faculty please use active language, per Bloom’s taxonomy)

- To develop knowledge of available resources as well as the means of searching available resources for nonprofit programs and agencies, particularly funding resources.
- To develop knowledge and skills in the processes of developing marketing strategies and plans for nonprofit organizations and programs.
- To develop knowledge and skills in creating a comprehensive, multi-faceted fundraising plan for a nonprofit organization.
- To develop knowledge and skills in the presentation of nonprofit funding proposals and in the development of relationships with key audiences, particularly with funders and other key decision makers.
- To develop knowledge and skills in writing effective nonprofit grant (and other) funding proposals.
• To consider the special circumstances involved in accomplishing the above for grassroots organizations and programs serving vulnerable populations.
• To accomplish the above, while upholding social work values and ethics.

VI. **School of Social Work Mission Statement and School Wide Learning Goals**

The mission of the School of Social Work is to develop and disseminate knowledge through social work research, education, and training that promotes social and economic justice and strengths individual, family, and community well-being, in this diverse and increasingly global environment of New Jersey and beyond.

School Wide Learning Goals: Upon graduation all students will be able to:

1. Demonstrate Ethical and Professional Behavior;
2. Engage Diversity and Difference in Practice; and
3. Engage, Assess, and Intervene with Individuals, Families, Groups, Organizations, and Communities

VII. **Required Texts**


**Supplemental Texts:**


Other readings can be found on the Sakai site for the class, the library, and the Internet.

VIII. **Teaching Methods**

Instruction will include lecture, case study analyses, and discussion of exercises related to fundraising strategies. A supportive learning environment will be emphasized, i.e., one that is fostered by listening to the ideas and views of others, being able to appreciate a point of view that is different from your own, articulating clearly your point of view, and linking experiences to readings and assignments. The instructor will appreciate your contributions to making this a safe and respectful class for learning and growth.

IX. **Course Requirements**

In order to have informed class discussions, it is expected that assigned readings will be completed by the due date, and that oral presentations will be well prepared. Class participation, complete attendance, and timely completion of assignments are expected. The course grade will be reduced for late assignments. **All electronic devices are to be turned off when class is in session.**

X. **Grading**
Specific information on completing the assignments will be provided during class by the instructor. Four factors will be considered in calculating your grade:

**Marketing Mid-Term Paper:** (50%). *Due in class*
**Oral presentation to the class of the grant proposal:** (10%). *Due in class*
**Fundraising Final Paper:** (25%). *Due to instructor by*
**Class Participation:** (15%). *In class and online for the duration of the course.*

Professional social workers keep case records, write treatment reports for referral sources and managed care companies, correspond with judges and other professionals, develop policy, and advocate for their clients. Each of these tasks requires excellent writing skills. Therefore proper grammar, syntax, spelling, and appropriate referencing are expected for all assignments. You must adhere to the style guidelines of the *Publication Manual of the*
American Psychological Association (6th Edition). Failure to do so will result in substantial deductions from your paper’s grade.

**Attendance is required on xxx.** Lateness to class or early departure are not acceptable, except for compelling reasons. In extenuating circumstances for medical, religious, or other reasons, the instructor will assign a makeup paper to satisfy academic requirements.

**XI. Course Evaluation**
Rutgers University issues a survey that evaluates both the course and the instructor. This survey is completed by students toward the end of the semester, and all answers are confidential and anonymous.
XII. **Academic Integrity Policy**

All work submitted in a graduate course must be your own.

It is unethical and a violation of the University’s Academic Integrity Policy to present the ideas or words of another without clearly and fully identifying the source. Inadequate citations will be construed as an attempt to misrepresent the cited material as your own. Use the APA citation style which is described in the Publication manual of the American Psychological Association, 6th edition.

Plagiarism is the representation of the words or ideas of another as one’s own in any academic exercise. To avoid plagiarism, every direct quotation must be identified by quotation marks or by appropriate indentation and must be properly cited in the text or footnote. Acknowledgement is required when material from another source is stored in print, electronic, or other medium and is paraphrased or summarized in whole or in part in one’s own words. To acknowledge a paraphrase properly, one might state: “to paraphrase Plato’s comment…” and conclude with a footnote identifying the exact reference. A footnote acknowledging only a directly quoted statement does not suffice to notify the reader of any preceding or succeeding paraphrased material. Information which is common knowledge, such as names of leaders of prominent nations, basic scientific laws, etc., need not be footnoted; however, all facts or information obtained in reading or research that are not common knowledge among students in the course must be acknowledged. In addition to materials specifically cited in the text, only materials that contribute to one’s general understanding of the subject may be acknowledged in the bibliography. Plagiarism can, in some cases, be a subtle issue. Any question about what constitutes plagiarism should be discussed with the faculty member.

Plagiarism as described in the University’s Academic Integrity Policy is as follows:

“*Plagiarism:* Plagiarism is the use of another person’s words, ideas, or results without giving that person appropriate credit. To avoid plagiarism, every direct quotation must be identified by quotation marks or appropriate indentation and both direct quotation and paraphrasing must be cited properly according to the accepted format for the particular discipline or as required by the instructor in a course. Some common examples of plagiarism are:

- Copying word for word (i.e. quoting directly) from an oral, printed, or electronic source without proper attribution.
- Paraphrasing without proper attribution, i.e., presenting in one’s own words another person’s written words or ideas as if they were one’s own.
- Submitting a purchased or downloaded term paper or other materials to satisfy a course requirement.
- Incorporating into one’s work graphs, drawings, photographs, diagrams, tables, spreadsheets, computer programs, or other non-textual material from other sources without proper attribution*.”
Plagiarism along with any and all other violations of academic integrity by graduate and professional students will normally be penalized more severely than violations by undergraduate students. Since all violations of academic integrity by a graduate or professional student are potentially separable under the Academic Integrity Policy, faculty members should not adjudicate alleged academic integrity violations by graduate and professional students, but should refer such allegations to the appropriate Academic Integrity Facilitator (AIF) or to the Office of Student Conduct. The AIF that you should contact is Laura Curran, at lacurran@ssw.rutgers.edu. The student shall be notified in writing, by email or hand delivery, of the alleged violation and of the fact that the matter has been referred to the AIF for adjudication. This notification shall be done within 10 days of identifying the alleged violation. Once the student has been notified of the allegation, the student may not drop the course or withdraw from the school until the adjudication process is complete. A TZ or incomplete grade shall be assigned until the case is resolved. For more information regarding the Rutgers Academic Integrity Policies and Procedures, see: [http://academicintegrity.rutgers.edu/academic-integrity-at-rutgers](http://academicintegrity.rutgers.edu/academic-integrity-at-rutgers).

XIII. **Disability Accommodation**
Rutgers University welcomes students with disabilities into all of the University's educational programs. In order to receive consideration for reasonable accommodations, a student with a disability must contact the appropriate disability services office at the campus where you are officially enrolled, participate in an intake interview, and provide documentation: [https://ods.rutgers.edu/students/documentation-guidelines](https://ods.rutgers.edu/students/documentation-guidelines).

If the documentation supports your request for reasonable accommodations, your campus’ disability services office will provide you with a Letter of Accommodations. Please share this letter with your instructors and discuss the accommodations with them as early in your courses as possible. To begin this process, please complete the Registration form on the ODS web site at: [https://ods.rutgers.edu/students/registration-form](https://ods.rutgers.edu/students/registration-form).
XIV. Course Outline

Session 1 – OVERVIEW (Readings to be completed by xxx)

Topics Covered:
- The Fundraising Environment
- Funding Sources
- Fundraising Ethics
- Types of Organizational Support (e.g. governments, foundations, corporations)
- Understanding Budgets

READINGS


The Robin Hood Fund: vimeo.com/36916051

19:910:541:91 Fundraising and Marketing
Fall 2018 Syllabus
Session 2 – AN OVERVIEW OF MARKETING (Readings to be completed by xxx)

Topics covered:
- Marketing Plans Made Specific/Segmenting Your Market

Branding
READINGS


Creating a Marketing Plan
READINGS

Stern, G. J. Marketing Workbook for Nonprofit Organizations, Volume 1; Part 1 *


Establishing Marketing Goals, Steps in the Marketing Process
READINGS
Stern, G.J., Marketing Workbook for Nonprofit Organizations, Volume 1; Step 1, Set Marketing Goals *

Developing a Marketing Audit: The Basics
READINGS
Stern, G.J., Marketing Workbook for Nonprofit Organizations, Volume 1; Step 3, Conduct a Market Audit *

Developing the Marketing Plan
READINGS
Stern, G.J., Marketing Workbook for Nonprofit Organizations, Volume 1; Step 4, Develop the Marketing Plan *
Session 3 – FUNDRAISING (Readings to be completed by xxx)

MARKETING MID-TERM PAPER DUE ON

Topics covered:
- Donor Research
- Understanding Donors
- Gender and Age Differences in Giving
- Fundraising Roles
- Gift Formats

Understanding Donors and their Motivations

READINGS


Inspiring the Next Generation Workforce: The 2014 Millennial Impact Report

Specialized Fundraising: Planned Giving, Special Events, Large Gifts, Capital Campaigns

Donors: Prospecting, retaining and “growing” established donors, and reactivating former donors.


Ethnic/Religious and Racial Giving; Assessing the Organization’s Fundraising Ability: Structure and Readiness

READINGS

Religion: pp. 5-9
Education: pp. 9-13
Income: pp. 13-17
Perceived financial position: pp. 17-22
Marital status & having children: pp. 23-26
Gender: pp. 29-31
Race: pp. 31-33
Immigration and citizenship status: pp. 33-34


Ball, African American Philanthropy
Dull, Dennis, Asian American Philanthropy


Mendelson, E. The History of Jewish Giving in America

Encyclopedia of Muslim-American History, Muslim Philanthropy

Ramos, H.A.J. Models of Philanthropy in the Latino Community


Bray: Chapter 3: Developing Your Fundraising Plan *

Who Does What? Fundraising Roles

READINGS


Bray: Chapter 2: Fundraising Tools *
Endowments and Bequests; New Fundraising Formats (Case Studies, Crowdfunding, Online Fundraising)

**READINGS**
Beth’s Blog: Five Best Practices in Nonprofit Crowdfunding
http://www.bethkanter.org/5-crowdfunding-tips

Online Fundraising Scorecard

Bray: Chapter 11: Creating Printed Communications Material *
Bray: Chapter 12: Designing Your Website to Draw in Donors *

Grants
Types of grants – Governmental (Local, State, and Federal), private foundations and corporations; The Foundation Center; Organizing and Writing a Grants Proposal: Creating the Narrative, Creating a Project Budget, Creating the Project Evaluation

**READINGS**
Karsh & Fox: Chapter 4: Getting ready to write a grant proposal *

Bray: Chapter 10: Seeking Grants from Foundations, Corporations, and Government *

Contracts vs. Grants

Choosing Which Type of Funding is Best for Your Program; The Program Proposal

**READINGS**
Karsh & Fox *
Chapter 6: Writing proposals with style: 12 basic rules
Chapter 7: Tackling the blank page
Chapter 8: Identifying and documenting need
Chapter 9: Goals and objectives
Chapter 10: Developing and presenting a winning program
Chapter 11: Finding partners and building coalitions
Chapter 12: The evaluation plan

Hall & Howlett *
Chapter 11: Qualifications and Personnel pp. 124-130

Session 4 – PROPOSAL PRESENTATIONS IN CLASS ON

Topics Covered:
- Student proposal presentations

FUNDRAISING FINAL PAPER DUE ON 12/8/18