COURSE NO.: SOWO 883
COURSE TITLE: Marketing and Fundraising for Nonprofit Organizations (SOWO 883), Fall 2008

TATE-TURNER-KURALT 102

INSTRUCTOR:

Walter C. Farrell, Jr., Professor
School of Social Work
548K Tate-Turner-Kuralt (TTK) Building
301 Pittsboro Street, CB# 3550
Chapel Hill, NC 27599-3550

Telephone: 843-8318 (O)
960-9284 (H)
Fax: 960-9275
E-mail: wfarrell@email.unc.edu (University)
E-mail: wcfpr@bellsouth.net (Home)

OFFICE HOURS: 12:00 p.m. – 2:00 p.m. Monday and 3:00 p.m.–5:00 pm Tuesday. Also M  T W TH & F by Appointment, 548K Tate-Turner-Kuralt or Bldg. or place convenient to student.

CLASS HOURS: Tuesday, 5:10 P.M.–8:00 P.M.
(This revised class start time was agreed upon by a unanimous vote of all class members on August 26, 2008 for safety reasons. Unexcused tardiness will result in a penalty deduction of up to 5 points for each late arrival.)

COURSE DESCRIPTION: This course enables students to develop skills and practices in marketing and fundraising strategies for nonprofit organizations at the macro level.

This syllabus is also available on the web at
http://www.unc.edu/~wfarrell/SOWO883/
COURSE OBJECTIVES

The purpose of this course is to help students understand the marketing and fundraising challenges facing nonprofits in today’s economy and to apply the appropriate marketing and fundraising strategies to address them. The specific objectives are to enable the student to:

**MARKETING**

- Document the dimensions, importance, and challenges of Marketing nonprofits,
- Assess the Marketing orientation of a nonprofit,
- Develop a nonprofit mission statement,
- Utilize research and strategic planning in Marketing nonprofits,
- Develop an offer and a Marketing communication and promotion strategy for nonprofits,
- Set a funding priority for a nonprofit,
- Review major gift strategies,
- Construct donor profiles, and
- Monitor a PR campaign and how to recruit nonprofit volunteers

**FUNDRAISING**

- Document contemporary Fundraising trends and why people give,
- Position a nonprofit to raise Funds,
- Review legal and organizational perquisites for Fundraising,
- Prepare a Fundraising case statement and note common mistakes,
- Review and develop “context specific” strategies to cultivate donors,
- Review and assess “traditional” and “new” Fundraising strategies,
- Develop and write elements of a Fundraising proposal, and
- Develop a Fundraising campaign

**READINGS**

Required Text/Readings:


Other class materials will be available on the Internet.
TEACHING METHODS

Instruction will include PowerPoint presentations, a case study analysis, and in- and out-of-class marketing and fundraising exercises related to the readings. The instructor will also draw upon examples from his experience in serving on nonprofit boards and providing technical assistance to nonprofit organizations. Students will also have leadership roles in class discussions.

A supportive learning environment will be emphasized, one that is fostered by listening to the ideas and views of others, appreciating a point of view that is different from your own, articulating clearly your point of view, linking experience to readings and assignments, and applying concepts from the readings. The instructor appreciates your contributions to making this a safe and respectful class for learning and growth.

GRADING SYSTEM

Students enrolled in SOWO 883 will have to earn the following number of points for the grades listed below.

H = 94 or more points
P = 80-93 points
L = 70-79 points
F = 69 and below

POLICY ON INCOMPLETES AND LATE ASSIGNMENTS

There will be no extensions of due dates for assignments except in emergency cases. EMERGENCY SITUATIONS MUST BE BROUGHT TO THE INSTRUCTOR’S ATTENTION PRIOR TO THE DUE DATE VIA PHONE OR EMAIL.

Points for an assignment will be awarded on an assigned points’ basis. To receive all or a portion of the points on an assignment, the student must (1) submit it to the instructor at the beginning or end of the class session when it is due and (2) write something that meets all of the assignment criteria. Papers will be graded, and feedback will be supplied promptly after submission.
Any EXCUSED ABSENCE will require formal documentation (e.g., doctor’s excuse, funeral program, etc.). An unexcused absence will result in a denial of the option to make up any assignment due and/or completed on that date.

INCOMPLETES will be given on rare occasions when the student has notified the instructor of an emergency that prevents him/her from completing remaining course requirements. Students must be current in all assignments at that time.

POLICY ON ACADEMIC DISHONESTY

Please refer to the APA Style Guide (fourth Edition) for information on attribution of quotes, plagiarism, and appropriate use of assistance in preparing assignments. All written assignments should contain a typed, signed pledge on the cover page of the assignment stating that, "I (we) have not given or received unauthorized aid in preparing this written work." If this pledge is not affixed to the written assignment, 1 point will be deducted from the grade on the assignment.

POLICY ON ACCOMMODATIONS FOR STUDENTS WITH DISABILITIES

Students with disabilities that affect their participation in the course and who wish to have special accommodations should contact the University’s Disabilities Services and provide documentation of their disability. Disabilities Services will notify the instructor that the student has a documented disability and may require accommodations. Students should discuss the specific accommodations they require (e.g., changes in instructional format, examination format) directly with the instructor.

POLICY ON USE OF ELECTRONIC DEVICES IN THE CLASSROOM

NO ELECTRONIC DEVICES CAN BE USED IN CLASS WITHOUT PRIOR APPROVAL OF THE INSTRUCTOR. Students with disabilities must provide written documentation of a disability requiring the use of a laptop or other electronic device for class. Use of electronic devices for non-class related activities (e.g., checking email, playing games, etc.) is prohibited.
OTHER POLICIES/GENERAL INFORMATION

Students are expected to attend all classes and to ARRIVE ON TIME AT 5:10 P.M. (as class will begin on time and there will be In-Class exercises to complete), complete ALL assigned readings, participate in class discussions, and SUBMIT WRITTEN ASSIGNMENTS IN CLASS ON THE DATE DUE OR PLACED IN THE INSTRUCTOR’S MAILBOX ON THE FIRST FLOOR IN TTK. No assignments will be accepted via email to the instructor’s account unless a special exception is granted.

Be advised that all typewritten papers will be GRADED FOR CONTENT and basic MECHANICS OF GRAMMAR (whether subject(s) and verb(s) agree, run-on sentences, misspelled words, fragment sentences, inappropriate use of commas, etc.) ONE POINT will be deducted for each of the grammar mistakes.

Students whose class attendance conflicts with religious holiday(s) should bring this matter to the instructor’s attention. No students will be excused for vacations, conferences, etc. unless approved by the SOWO administration.

CLASS ASSIGNMENTS

(Point distributions may be changed after consultation with students.)

CASE ANALYSES (10 points)

On the days that the case covered in the course will be discussed, a two-to-three page paper should be submitted that contains the following material: (CASE MAY BE SUBSTITUTED BY THE INSTRUCTOR.)

1. A listing of the major issues and/or controversies in the case.

2. A listing of the major strategies for resolving the most pressing issues with a short explanation of the rationale for your choices.

3. Discussion of your approach if you had the opportunity to start from scratch.

(Additional guidelines will be distributed one week prior to case submission.)

FIJI Case Study (5 points): Will be placed on the website two weeks before it is due. Due September 23, 2008.
HARBUS Case Study (5 points):
Address: http://www.unc.edu/~wfarrell/SOWO883/Harbuscase.pdf
Due Date: November 11, 2008.

You have the responsibility to select a nonprofit for analytical purposes. If you have difficulty, please contact the instructor. The expectations for each exercise will be distributed one week prior to the due date.

MARKETING EXERCISES (20 Points)

Exercise #1: Based on a review of current periodicals (see Time Magazine, etc. 12/26/05-1/2/06 and recent Internet articles), prepare a 1-3 page, double-spaced essay (including references) making a case for “areas of funding” from government, foundations, corporations that nonprofits will be able to market to during the next 5 years. Provide at least five reference citations for the Periodicals and/or Internet sites consulted. Due September 2, 2008 (4 points).

Exercises #2, #3, #4, and #5: One Page Assessment/Analytical Memo (5pts. each x 4 = 20 pts. Total) You will be assigned to write one page, single-spaced memos on dates noted in syllabus in which you will assess/analyze an issue/concept from the required readings. You will be given directions/guidelines as to the content of the memo 1 week prior to the due date. Due date: September 9, 16, 30, and October 7, 2008 (4 points each).

MIDTERM EXERCISE (15 points)

Guidelines will be distributed on October 7, 2008. Midterm Exercise is due in my mailbox on the first floor TTK at 8:00 p.m. on October 14, 2008.

FUNDRAISING EXERCISES (25 points)

Fundraising Exercises #1, #2, #3, #4, and #5: One to Two Page Assessment/Analytical Memo (5 pts. each x 5 = 25 pts. Total) You will be assigned to write one to two page, single-spaced memos on dates noted in syllabus in which you will assess/analyze an issue/concept from the required readings. You will be given directions/guidelines as to the content of the memo one week prior to the due dates. Due dates: October 21, 28, and November 4, 18, and 25, 2008.
CLASS PRESENTATION (10 points)

Each student will be assigned to a team and will be responsible for leading a portion of one class session.

IN-CLASS EXERCISES (10 points)

Students will earn up to 2 point each as members of a team on In-Class exercises on designated dates.

FINAL PAPER (10 points)

Develop a multi-faceted fundraising plan for a hypothetical nonprofit organization or one with which you are working. Discuss the strengths and weakness of the fundraising strategy that you have developed, and assess its overall possible contributions to the organization. **Please limit to 10 double-spaced typed pages** (including tables, graphs, etc.). **Due date: December 2, 2008** (May be revised after consultation with class as course progresses).

In keeping with the UNC Honor Code, if reason exists to believe that academic dishonesty has occurred, a referral will be made to the Office of the Student Attorney General for investigation and further action as required.

READINGS AND COURSE OUTLINE

Student work groups have been assigned to provide an overview of the key issues in the readings for each class as designated on the syllabus. The instructor will provide each group with a set of guidelines to address based on the assigned readings for each date. Students will be expected to discuss the readings using a short PowerPoint presentation. (The presentation must be emailed to the instructor one day before the presentation so that copies can be made for the class.)

**Tuesday, August 19**

Introduction and Overview of Course
Instructor Background
Personal Goals
Selecting a Nonprofit to Work With or Not?
Revision of Syllabus
Tuesday, August 26

Required Readings:
Nonprofit Marketing, Mission Focus, etc. (Wymer et.al., Chapters 1 & 2)
- Dimensions, Importance of Nonprofit Sector
- Types of Nonprofits
- Challenges, Adoption, Current Issues
- Mission, Strategy, Differentiation
- Positioning, Unique Value, Branding, Segmentation

SELECT THE NONPROFIT WITH WHICH YOU WILL WORK???

Tuesday, September 2

Required Readings:
Research and Strategic Marketing (Wymer et.al., Chapters 3 & 4)
- Research in and Orientation of Nonprofits
- The Importance of Research
- Strategic Marketing and Planning (Practical)
- Strategic Marketing Analysis (Practical)
- Planning Situations, Organizational Culture, values
- When Market-Based Strategies are Important (Practical)

MARKETING EXERCISE #1 DUE
Group #1 Class Presentation
In-Class Exercise #1

Tuesday, September 9

Required Readings:
Offers In Nonprofits (Wymer et.al., Chapters 5 & 6)
- Identification, Levels, and Classifications
- Offer Management, Development, and Distribution
- Marketing Communication and Promotion
- Monetary and Nonmonetary Pricing

Marketing Assessment/Analytical Memo Exercise #2 Due
Group #1 Class Presentation

Tuesday, September 16

Required Reading:
Direct Marketing Tactics (Wymer et.al., Chapter 7)
- Importance of Direct Marketing
- Types of Direct Marketing
- Developing a Direct Marketing Program

Marketing Assessment/Analytical Memo Exercise #3 Due
Group #2 Class Presentation
Tuesday, September 23

Required Readings:
Attracting Major Gifts, Marketing to Volunteers (Wymer, Chapters 8)
- Looking through a Donor’s Eyes
- Donor Profile
- Tactics, Tasks, and the Close

FIJI Case Study Due
In-Class Exercise #2

Tuesday, September 30

Required Reading:
Monitoring the PR Campaign (Wymer, Chapters 10)
- Getting and Classifying Volunteers
- Understanding Volunteer Motivation

Group #4 Class Presentation
Marketing Assessment/Analytical Memo Exercise #4 Due

Tuesday, October 7

Introduction to Fundraising
- Fundraising Trends
- Why People Do and Do Not Give
- Ethical Issues in Fundraising
- Demographics, Diversity, and Fundraising
- What is fundraising?

Positioning Your Organization to Raise Funds
- Legal and Organizational Prerequisites
- Internal and External Readiness
- Strategic Planning

Required Readings:
Article: When in Doubt, Think
Author: Andy Robinson (September/October, 1996)
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/whenindoubtthink.htm (2 pp.)

Article: Harvard Turns to the Web: University Tests Email for Fundraising
Author: Todd Cohen (September, 2000)
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/cyberfrontier.htm (2 pp.)
Article: What is a Strategic Plan
Author: Internet Nonprofit Center (4/14/97)
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/strategicplan.htm (7 pp.)

Article: What are the Steps of a Strategic Planning Process
Author: Internet Nonprofit Center (4/14/97)
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/strategicsteps.htm (4 pp.)

Article: Essential Ingredients for Fundraising Planning
Author: Tricia Rubacky (1992)
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/essentialingredients.htm (7 pp.)

Article: Ethical Dilemmas in Religious Fundraising: The Price of Achieving Heaven on Earth
Author: Terry W. Hammond (2000)
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/ethicaldilemmas.htm (7 pp.)

Article: Diversity Essay: Philanthropy as a Tenet of Islam
Author: John Huebler
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/islam.htm (3 pp.)

Article: Diversity Essay: A Glimpse at the Gay and Lesbian Donor
Author: Donna Red Wing
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/gay.htm (3 pp.)

Article: Diversity Essay: Black Philanthropy in America
Author: Spencer I. Scott
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/black.htm (2 pp.)

Article: Diversity Essay: Traditions of Giving and Sharing in Asian Cultures
Author: Janice Gow Pettey, CFRE
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/asian.htm (3 pp.)

Article: Diversity Essay: Latino Philanthropy in the U.S.
Author: Juan Calixto, CFRE
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/latino.htm (2 pp.)
Article:  Diversity Essay: Fundraising in the Jewish Community  
Author: Henry D. Lewis, CFRE  
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/jewish.htm (2 pp.)

Article:  Diversity Essay: Native American Fundraising: Don’t Forget Your Blanket  
Author: Kay C. Peck, CFRE  
Address: http://www.afpnet.org/tier3_cd.cfm?folder_id=1865&content_item_id=6528 (2 pp.)

Article:  Diversity Essay: Native American Culture and Fundraising  
Author: Prudence S. Precourt, Ph.D., CFRE  
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/nacultureandfunds.htm (3 pp.)

Article:  Diversity Essay: Characteristics of Cuban-American Fundraising  
Author: Rolando Damian Rodriguez, CFRE  
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/cuban.htm (3 pp.)

Possible Guest Speaker  
Marketing Assessment/Analytical Memo Exercise #5 Due  
Group #5 Class Presentation

Tuesday, October 14

MIDTERM REVIEW (NO CLASS)

MIDTERM EXERCISE #3 DUE BY 8:00 P.M. VIA IN MY MAILBOX IN TATE-TURNER-KURALT ON FIRST FLOOR
Tuesday, October 21

Making Your Case
- Case Statement (Business Plan) Essentials
- Common Mistakes

Researching Potential Funding Sources
- Individuals
- Corporations
- Foundations
- Government Sources

Essential Strategies of a Good Fundraising Program
- Donor Cultivation and Solicitation
- Natural Partners
- Donor Identification and Tracking
- Quality Cultivation Processes

Required Readings:
Text: Edwards (Chapters 1, pp.1-22, 2 pp. 23-36 & 43-45, & Chapter 4)

Recommended Readings:
Article: Nonprofit Case Statement
Author: Hodiak Development (2001-2002)

Article: The Cultivation Process
Author: Henry D. Lewis, CFRE (April 30, 2002)
Address: [http://www.unc.edu/~wfarrell/SOWO883/Readings/cultivationprocess.htm](http://www.unc.edu/~wfarrell/SOWO883/Readings/cultivationprocess.htm) (4 pp.)

Article: Asking for the Money: “If You Don’t Ask, You Don’t Get”
Author: Tony Poderis (1998)
Address: [http://www.unc.edu/~wfarrell/SOWO883/Readings/askingformoney.htm](http://www.unc.edu/~wfarrell/SOWO883/Readings/askingformoney.htm) (5 pp.)

Article: FundClass Archive: Donor Cultivation
Author: Lorraine Urquhart
Address: [http://www.unc.edu/~wfarrell/SOWO883/Readings/donorcultivation.htm](http://www.unc.edu/~wfarrell/SOWO883/Readings/donorcultivation.htm) (14 pp.)

Article: Cultivating Donors – Aim is to Build Trust
Author: Todd Cohen
Address: [http://www.unc.edu/~wfarrell/SOWO883/Readings/cultivatingdonors.htm](http://www.unc.edu/~wfarrell/SOWO883/Readings/cultivatingdonors.htm) (3 pp.)
POSSIBLE GUEST SPEAKER
Fundraising Assessment/Analytical Memo Exercise #1 Exercise Due
In-Class Exercise #3

Tuesday, October 28

Constructing a Campaign
- Goal Setting
- Developing the Gift Pyramid
- Campaign Organizational Structure
- Leadership Selection and Recruitment
- Acknowledgement and Stewardship

Required Readings
Text: Edwards (Chapter 2, pp. 37-43 and 50-62)

Article: When Does Conducting a Development Assessment Make Most Sense?
Author: Judith Nichols (1999)
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/developmentassessment.htm (5 pp.)

Article: Successful Fundraising
Author: Kate Peyton (1993)
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/successfulfundraising.htm (5 pp.)

Article: Fundraising ABC’s
Author: Barbara Minogue (1997)
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/fundraisingabcs.htm (4 pp.)

Topic: Ethics, Stewardship and Mission: Taking Fundraising Seriously
Article: Accountability + Stewardship = Successful Fundraising
Author: Trisha Lester and Dianne Russell (March-April 1996)
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/accountability.pdf (3 pp.)

Fundraising Assessment/Analytical Memo Exercise #2 Exercise Due
Group #6 Class Presentation
Tuesday, November 4

Fundraising Strategies
- Annual Fund
- Telephone Solicitation
- Direct Mail
- Planned Giving
- Corporations
- Government
- Foundations

Required Reading:
Text: Edwards (Chapter 3); Wymer (Chapter 7)

Article: The Ten Ways that Nonprofits Raise Money
Author: Zimmerman Lehman (2001)
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/10waystoraise money.htm (9 pp.)

Article: Direct Response Marketing
Author: The Nonprofit Times
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/directresponse marketing.htm (4 pp.)

Article: Study Shows Big Hike in Planned Giving
Author: Clint Carpenter (2000)
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/plannedgiving.htm (4 pp.)

Article: “But I Hate Being Phoned:” 10 Myths of Telephone Fundraising
Author: Bob Penner
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/10myths.htm (4 pp.)

Article: The Capital Campaign Feasibility Study: Always a Good Idea
Author: Bob Zimmerman
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/campaignfeasibility.htm (3 pp.)

Article: Major Donor Campaigns: The Heart of Any Successful Fundraising Effort
Author: Bob Zimmerman
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/majordonorcampaigns.htm (5 pp.)
Group #7 Class Presentation
Fundraising Assessment/Analytical Memo Exercise #3 Exercise Due

Tuesday, November 11

Fundraising Strategies (cont’d.)
- Special Events
- Cause Related Marketing
- Social Entrepreneurship

Required Readings:
Text: Edwards (Chapters 5 & 6), Wymer (Chapters 9, 11, & 12)

Related Readings:
Article: Cause Related Marketing: Proceed with Caution
Author: Ruth McCambridge (March 2002)
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/causerelatedmarketing.htm (3 pp.)

Article: Is AMA’s Embarrassing Sunbeam Deal a Cue for Less Risks by Associations?
Author: Henry Saeman (March/April 1998)
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/AMA.htm (2 pp.)

Article: The Meaning of Social Entrepreneurship
Author: Gregory Dees
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/socialentrepreneurship.htm (7 pp.)

Article: If Pigs Had Wings
Author: Bruce Sievers (November/December 1997)
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/ifpigshadwings.htm (5 pp.)

Article: Promoting good Causes Can be Good for Business
Author: Joanna Krotz
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/promotinggoodcauses.htm (3 pp.)

Article: Social Enterprise Meets Venture Philanthropy: A Powerful Combination
Author: Alison Buttenheim
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/socialenterprise.htm (12 pp.)
HARBUS CASE ANALYSIS DUE
Group #8 Class Presentation
In-Class Exercise #4

Tuesday, November 18

Writing Winning Proposals/Business Plans & Managing Grants/Funding I

- Common Sections: Grant Applications
- Business Plans
- Strategies for Effective Writing

Required Readings:

Article: Basic Elements of Grant Writing
Author: Corporation for Public Broadcasting
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/basicelementsofgrantwriting.htm (8 pp.)

Article: The Art of Writing Proposals: Some Candid Suggestions for Applicants to Social Science Research Council Competitions
Author: Adam Przeworski and Frank Salomon (1995)
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/artofproposalwriting.htm (5 pp.)

Article: Developing and Writing Grant Proposals
Author: Catalog of Federal Domestic Assistance
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/developingandwritingproposals.htm (7 pp.)

Article: Elements of a Business Plan
Address: http://www.unc.edu/~wfarrell/SOWO883/BPlan.doc (3 pp.)

Topic: Budget Preparation
Article: How Do We Prepare a Budget?
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/preparingabudget.htm (3 pp.)

Article: Develop Content – A Grantwriting Checklist
Author: University of Washington
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/grantwritingchecklist.htm (2 pp.)

Article: Successful Grant Writing: Six Steps to a Winning Proposal Through Collaboration and Teamwork
Author: Cassie McVeety
Address: http://www.unc.edu/~wfarrell/SOWO883/Readings/6stepstoawinningproposal.htm (12 pp.)
Article: An Introduction to Business Plans
Author: 
Address: [http://www.unc.edu/~wfarrell/SOWO883/Readings/introductiontobusplans.htm](http://www.unc.edu/~wfarrell/SOWO883/Readings/introductiontobusplans.htm) (6 pp.)

Group #9 Class Presentation
‘Fundraising Assessment/Analytical Memo Exercise #4 Exercise Due

**Tuesday, November 25**

**Writing Winning Proposals/Business Plans & Managing Grants/Funding II**
- Preparing the Budget
- Developing Your Evaluation Plan
- Managing Your Grant/Funding
- Reporting Strategies

**Required Readings**

**Topic:** Budget Preparation
**Article:** How Do We Prepare a Budget?
**Address:** [http://www.unc.edu/~wfarrell/SOWO883/Readings/preparingabudget.htm](http://www.unc.edu/~wfarrell/SOWO883/Readings/preparingabudget.htm) (3 pp.)

**Article:** Develop Content – A Grantwriting Checklist
**Author:** University of Washington
**Address:** [http://www.unc.edu/~wfarrell/SOWO883/Readings/grantwritingchecklist.htm](http://www.unc.edu/~wfarrell/SOWO883/Readings/grantwritingchecklist.htm) (2 pp.)

**Article:** Successful Grant Writing: Six Steps to a Winning Proposal Through Collaboration and Teamwork
**Author:** Cassie McVeety
**Address:** [http://www.unc.edu/~wfarrell/SOWO883/Readings/6stepstoawinningproposal.htm](http://www.unc.edu/~wfarrell/SOWO883/Readings/6stepstoawinningproposal.htm) (12 pp.)

**Article:** An Introduction to Business Plans
**Author:** 
**Address:** [http://www.unc.edu/~wfarrell/SOWO883/Readings/introductiontobusplans.htm](http://www.unc.edu/~wfarrell/SOWO883/Readings/introductiontobusplans.htm) (6 pp.)

**Fundraising Assessment/Analytical Memo Exercise #5 Exercise Due**
**In-Class Exercise #5**
Tuesday, December 2

Review and Summary of Key Elements of Marketing and Fundraising for Nonprofits

- Course Evaluations
- FINAL PAPER DUE IN CLASS
- Q & A, Final Exercise