FUNDRAISING FOR TCD PROFESSIONALS
LAS 6291 (Section 6304): Spring Semester, 2016

INSTRUCTORS & OFFICE HOURS
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Email: embruna@ufl.edu           Email: loiselleb@ufl.edu

Monday, 10:00-11:30 or by appointment  Tuesday, 9:00-10:30 or by appointment
380 Grinter Hall                  347 Grinter Hall

LECTURE/DISCUSSION: Wednesday, 3-5 periods (9:35-12:35p) in Grinter Hall 376

COURSE OBJECTIVES: Many of the graduates from the Tropical Conservation and Development program work outside of traditional academia in non-profit organizations, research institutes, or consulting. Even those in academia are confronted with raising funds for programs that fall outside of the standard research grant proposal model. Traditional graduate student courses in conservation and development do not address the practical and critical skill of developing and funding programs. The objectives of this course are (1) to introduce students to the diverse set of private and public sources for funding their activities (2) to develop the skills needed to fundraise from these sources, including the development of donor profiles, constructing fundraising plans, applying fundraising strategies and tactics, and understanding ethical and legal issues surrounding fundraising. Students will learn by doing: all students will (1) develop and implement a fund-raising project focused on their work and (2) work as a group to develop a fundraising plan for an organization.

After completing the course, students will be able to:

(1) Design and implement a crowd-funding project
(2) Use social media to improve success of fundraising effort
(3) Develop targeted fundraising plan
(4) Create donor/funding organization lists and profiles
(5) Conduct a direct mail campaign
(6) Prepare a letter of inquiry or concept paper
(7) Plan fundraising event

COURSE MATERIALS:


2) Readings available on the course web page: http://brunalab.org/las6291
EVALUATION (=GRADING): The grades for this course are based on the following:

1. Individual Crowdfunding Project: 1500 points
2. Group TCD Development Plan: 2000 Points
3. Class Participation: 200 points
4. Summarizing key points of the readings for discussion: 140 points
5. Preparing 2 questions for guest speakers: 160 points

TOTAL: 4000 points

Final Grades will be assigned on the following scale: A = >93%, A- = 92-90%, B+ = 89-87%, B = 86-83%, B- = 82-80%, C+ = 79-77%, C = 76-73%, C- = 72-70, D+ = 69-67%, D = 66-63%, D- = 62-60%, E = 59% and below. Please note that Letter grades of C-, D+, D, D- or E are not considered passing at the graduate level.

Attendance policy: Attendance at all sessions is required. Please arrive on time as a courtesy to your colleagues (and please turn off your cell phones!).

Make-up and late assignment policy: The grade of late assignments will be reduced 10 points for each day they are late. If you need to miss an exam for whatever reason (conference, illness, family emergency, etc.), please contact us as soon as possible to make arrangements to take a make-up exam.

Regrades: Requests for re-evaluation of assignments will only be considered if they are accompanied by a letter explaining why you think you deserve additional credit and how many additional points. The deadline for submitting these requests is one week after the work has been returned.

Accommodation for Students with Disabilities: The Disability Resource Center in the Dean of Students Office provides students and faculty with information and support regarding accommodations for students with disabilities in the classroom. For more information, see: http://www.dso.ufl.edu/drc/. Students Requesting classroom accommodation must first register with the Dean of Students Office. That office will provide the student with documentation that he/she must provide to the course instructor when requesting accommodation. If you have a disability and need special facilities or time for taking tests, please register with the Disability Resource Center (DRC). We will gladly follow any recommendation the DRC makes if it will help you do well in class.

Resources are available on-campus for students having personal problems:

a) University Counseling Center, 301 Peabody Hall, 392-1575, Personal and Career Counseling.

b) SHCC Mental Health, Student Health Care Center, 392-1171, Personal and Counseling.

c) Center for Sexual Assault/Abuse Recovery and Education (CARE), Student Health Care Center, 392-1161, sexual assault counseling.
d) Career Resource Center, Reitz Union, 392-1601, career development assistance and counseling.

In addition, UF provides an educational and working environment for its students, faculty, and staff that is free from sex discrimination and sexual harassment. For more about UF policies regarding harassment, see:
http://www.dso.ufl.edu/studentguide/studentconductcode.php#s4041

**Honor Code:** All students are required to abide by the Student Honor Code. For more information about academic honesty, including definitions of plagiarism and unauthorized collaboration, see: http://www.dso.ufl.edu/sccr/honorcodes/honorcode.php

**Software Use:** All faculty, staff and students of the University are required and expected to obey the laws and legal agreements governing software use. Failure to do so can lead to monetary damages and/or criminal penalties for the individual violator. Because such violations are also against University policies and rules, disciplinary action will be taken as appropriate. We, the members of the University of Florida community, pledge to uphold ourselves and our peers to the highest standards of honesty and integrity.
## COURSE OUTLINE

<table>
<thead>
<tr>
<th>Week</th>
<th>Date</th>
<th>Topic</th>
<th>Assignment Due: Individual Project</th>
<th>Assignment Due: Group Project</th>
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<tbody>
<tr>
<td>1</td>
<td>1/6</td>
<td>Introduction to Fundraising and Development</td>
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<tr>
<td>2</td>
<td>1/13</td>
<td>Development Planning</td>
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<td>Rockethub registration &amp; Project Overview</td>
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<td><strong>Speaker:</strong> Dr. Jai Ranganathan, Co-founder, SciFund Challenge (11 am)</td>
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<td>3</td>
<td>1/20</td>
<td>Identifying Donors</td>
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<td>Online profiles &amp; web page &amp; Reward Plan</td>
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<td>Video Design Workshop</td>
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<td>4</td>
<td>1/27</td>
<td>Solicitation &amp; Marketing</td>
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<td>Project Description</td>
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<td><strong>Speaker:</strong> Todd Sanders, Director of Social Media, UF University Relations (10:30 am)</td>
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<td>5</td>
<td>2/3</td>
<td>Fundraising Events</td>
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<td>Project Video</td>
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<td><strong>Speaker:</strong> Justin Donnelly, UF Student Affairs</td>
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<td>6</td>
<td>2/10</td>
<td>Workshop day to work on Group Project (Event)</td>
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<td>Final Campaign Plan</td>
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<td>7</td>
<td>2/17</td>
<td>Direct Mail and Internet Solicitation</td>
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<td>Launch Campaign!</td>
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<td>8</td>
<td>2/24</td>
<td>Workshop day to work on Group Project</td>
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<td>TCD Campaign Overview</td>
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<td>9</td>
<td>3/2</td>
<td><strong>NO CLASS:</strong> SPRING BREAK</td>
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<td>10</td>
<td>3/9</td>
<td>Corporate Philanthropy &amp; Foundations</td>
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<td>Direct Mail Products</td>
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<td><strong>Speaker:</strong> Margaret Atherton Senior Director, Corporate &amp; Foundation Relations (9:45 am)</td>
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<td>11</td>
<td>3/16</td>
<td>Concept Notes, Grant Proposals</td>
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<td>Campaign Ends!</td>
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<td>Peer Review of Direct Mail Products</td>
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<td>Week</td>
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<td>Activity</td>
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<td>12</td>
<td>3/23</td>
<td>The day-to-day of fundraising for a nonprofit</td>
<td>Social Media Plan</td>
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<td><strong>Speakers:</strong> Brian Pope, Director, Lubee Bat Conservancy (10:00-11:00)</td>
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<td>and David Pais, Board of Directors and Past-President, Conservation Land Trust of Florida (11:15-12:15)</td>
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<td>13</td>
<td>3/30</td>
<td>Nonprofit Organizational Structure and Management</td>
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<td><strong>Speaker:</strong> Jennifer Amanda Jones, Assistant Professor of Nonprofit Leadership and Management</td>
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<td>14</td>
<td>4/6</td>
<td>Fundraising, Ethics, and The Law</td>
<td>Event Plan</td>
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<td><strong>Speaker:</strong> Susan Goffman, Director of Legal Services, UF Foundation (pending)</td>
<td>Final Fundraising Report &amp; Evaluation</td>
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<td>15</td>
<td>4/13</td>
<td>In class day to work on group project</td>
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<td>16</td>
<td>4/20</td>
<td>Group Presentations of Development Plan</td>
<td>Final Report &amp; revised Campaign Materials</td>
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<td>Course Evaluation</td>
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<td><strong>NB:</strong> There is no final exam in this class</td>
<td>Group Project Peer Evaluation</td>
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INDIVIDUAL CROWDFUNDING PROJECT

Crowdfunding is emerging as one of the most innovative ways for people and organizations to fund their projects. To explore the potential for crowdfunding to help finance research, every student in the class will develop and implement a crowdfunding campaign. The project for which you raise funds is up to you, though we expect most of you will focus on your thesis project, summer research, or a project you are working on with in-country collaborators or partner institutions. The projects will be posted on February 17, 2016 and run for 4 weeks.

AMOUNT: The project request should be $1000-$2000.

PLATFORM: We will be posting our projects to Rockethub (www.rockethub.com) which has a simple interface and is well suited to the variety of projects we seek to fund. If you reach your goal they charge a 4% commission fee + 4% credit card handling fee. If you don’t reach your goal they charge an 8% commission fee + 4% credit card fee.

GRADING: Your grade on this assignment will not be based on if you get funded, but rather on how well you complete the different elements of a successful campaign. The assignment is worth 1500 points and is made up of the following components:

DUE JANUARY 13th:

1) Register on Rockethub, review different projects to get ideas and familiarize yourself with the sites, complete the readings

2) Project Overview (150 points) to include:
   a. The project title
   b. a 2-3 sentence summary of the project for which you seek support
   c. The total amount required for the project
   d. A brief explanation of how you will make up the difference between the amount required for the project and the amount of your campaign

DUE JANUARY 20th

3) Plan the price points and rewards offered to donors. (150 points)

4) Prepare your internet and social media presence (100 points)
   a. Register on twitter and follow 15-20 accounts that will be of use during your campaign (prepare as a list called “LAS6291”).
   b. Launch your professional / project web site using platform of your choice.
DUE JANUARY 27th

5) Prepare the Project Description (300 points)
   a. 2-3 paragraphs of text
   b. Images and Audio (if appropriate)
   c. “About” page

DUE FEBRUARY 3rd

6) 2-3 min. campaign video (200 points)

DUE FEBRUARY 10th

7) Final Campaign Plan (300 points)
   a. potential funders, including networks such LATAM, UFL, partner
      institutions, alumni association, etc., and plan for interacting with them
   b. Plan for outreach, including social media, press, etc.
   c. Plans for dealing with ‘the dip’
   d. Plan for following-up if funded.

DUE FEBRUARY 17th

8) Launch project

DUE FEBRUARY 17th-March 16th

9) Implementation of outreach plan and promotion of campaign (100 points)

DUE April 6th

10) Report & Evaluation Crowdfunding Project (1000-1500 words) (200 points)
GROUP PROJECT: DEVELOPMENT PLAN FOR TCD

In addition to Individual Projects, you will be working in groups to develop skills used by organizations to support their activities. To learn about organizing and implementing a development campaign, your assignment is to develop a plan to establish an Annual Giving Campaign for the TCD program.

Your Development Plan should lay out how TCD can raise $20,000 per year by 2019. These funds will go to the TCD Fund (http://www.tcd.ufl.edu/make-a-gift/tcd-fund; UF Foundation Fund # 017809). Your final plan will include (1) a written report with the components described below and (2) an in-class presentation of the proposal.

GRADING: The assignment is worth 2000 points and is made up of the following components:

DUE FEBRUARY 24th

1) Draft Campaign Overview (200 points). This should include the following:
   
   (a) An overview of the campaign goals and potential activities TCD can carry out to meet its fundraising objectives.

   (b) A Donor research file describing the potential sources for funding the campaign (e.g., UF or TCD alumni, TCD partners, Steering Committee, faculty, corporations, foundations, private donors, etc.). How much is typically raised from each source each year? Use actual dollars and percentages.

   (c) A 2016-2019 timeline of major campaign milestones, including both financial and activity targets

   (d) An annual calendar of TCD current and proposed fundraising campaign activities (please also note key LATAM, UF, or Community dates, e.g., other fundraisers, Homecoming, breaks)

   We strongly recommend you interview people on campus familiar with such campaigns for insights into these issues and what makes these campaigns successful. Potential sources include the UF Foundation, college-level development officers, Chairs of departments with successful annual giving campaigns, etc.

DUE MARCH 9th

2) Direct Mail products targeted for the different donor groups that can contribute to the campaign (200 points).
DUE MARCH 23\textsuperscript{th}

3) A plan for TCD’s use of social media to meet its fundraising goals, including general promotion of TCD over the course of the year and specific activities for individual fundraising events. Please be sure to tailor activities to different social media platforms (200 points).

DUE APRIL 6\textsuperscript{th}

4) A plan for an annual TCD Fundraising Event (400 points). Include a description of the event and a detailed plan for its promotion, implementation, and evaluation. Issues to address include the fundraising goal and target audience for the event, recruiting and training of volunteers, event venue, security, liability, and other logistical considerations, the timing of the event and potential overlap with other UF, LATAM, TCD, and community events, corporate sponsorship and underwriting, whether the event should be held in Gainesville or other cities, potential partnership with other entities on campus and beyond).

DUE APRIL 20\textsuperscript{th}

5) Final Campaign Overview (400 Points)

6) Revised versions of items 2-4 (300 points).

7) Presentation of your fundraising campaign plan (200 points).

DUE APRIL 25\textsuperscript{th}

8) Each person must submit an evaluation of every team member’s contribution to the project. This evaluation will not be shared with team members (100 points).
READINGS

Week 1: Introduction to Fundraising and Development

(1) Ch. 1-4

Week 2: Development Planning

(1) Ch. 5-9

(2) UF Foundation Fundraising Policy (pp. 36-38)


(4) Video by authors about Byrnes et al. 2014: http://youtu.be/lxpgfRR11w4

(5) SciFund Challenge Resources (at http://scifundchallenge.org)

(a) How does crowdfunding work?: http://tinyurl.com/hq2jwy4
(b) Crowdfunding tips for scientists: http://tinyurl.com/j4u9l7b
(c) First Week of planning: http://tinyurl.com/okgnhej

(6) RocketHub Success School: http://tinyurl.com/q45wsdp

(7) Jacquelyn Gill blog post: “Crowd-funded science: thoughts after 185 people gave us $10,733 for research”: http://tinyurl.com/qzecldt

Week 3: Identifying Donors

(1) Ch. 10-11, 30


Week 4: Solicitation & Marketing

(1) Ch. 18, 26, 32


(1) The power of social media @ UF: http://tinyurl.com/h6c9exb
Week 5: Fundraising Events

(1) Ch. 14, 16, 17, 21, 25

(2) UF Program Planning Manual – Student Activities (pp. 1-24): http://tinyurl.com/pjeekav

Week 6: Fundraising Event Workshop Day

No readings

Week 7: Direct Mail and Internet Solicitation

(1) Ch. 19-20

Week 8: Group Project Workshop Day (No readings)

Week 9: Spring Break (No readings)

Week 10: Corporate Philanthropy & Foundations

(1) Ch. 12-13

(2) The elevator speech: bit.ly/11MobEV

Week 11: Written Solicitations, Concept Notes, Grant Proposals

TBD

Week 12: The day-to-day of running your own nonprofit

(1) Ch. 24, 27, 28

Week 13: Nonprofit Organizational Structure and Management

(1) Ch. 29, 31
Week 14: Fundraising, Ethics, and The Law

(1) Ch. 35-36

(2) UF Foundation Fundraising Policy (pp. 1-18)

Week 15: Group Project Workshop Day *(No readings)*

Week 16: Group Presentations of Development Plan *(No readings)*