

**The University of Minnesota
School of Social Work
SW5810 - Resource Development: Grant Writing and Fund Raising
(1credit)**

I. Course Description

Procuring and managing financial resources ethically in human service settings. Topics include principles of philanthropy, fund raising planning and management, grant writing, and stewardship/accountability requirements.

II. Course Context

The acquisition, development, and management of resources are major concerns for human service managers and leaders. Managers and organizations' abilities to manage and direct scarce resources, and to develop relations with donors and grant makers, will greatly impact the quality and quantity of services to clients and communities, and will influence the climate of the workplace for staff. This course addresses many aspects of acquiring financial resources for human service organizations. Emphasis will be on carrying out fundraising responsibilities in a manner conducive to the ethical and successful accomplishment of organizational mission and the attainment of positive client outcomes.

III. Specific Learning Outcomes-

At the end of the course participants will-

- 1) Understand the scope and role of philanthropy in American society and internationally and its application in human service organizations, and know the fund raising vehicles available to access philanthropic support.
- 2) Demonstrate the ability to design a comprehensive strategic fund raising plan for a project/organization, based on organizational/community needs and opportunities, and articulate the strategies necessary to carry out the plan successfully.
- 3) Be proficient in researching sources of grant support, developing relationships with grant makers, and in preparing and submitting grant requests.
- 4) Be able to conceptualize and analyze ethical issues and social work values involved in fund raising, donor relations, and financial management.
- 5) Understand the various vehicles available to develop relationships and produce capital resources necessary to carry out programs and services efficiently and effectively.

IV. Cultural Competency

Class participants will be presented with material designed to increase their cultural competence as human service managers and leaders, and their ability to manage diversity in a multicultural workplace and community. Material presented will allow students to learn about the cultural context of philanthropy and financial resource development, and specifically to understand the philanthropic traditions with/in/through diverse cultures and ethnic groups, in America and in the world. Strategies will be examined that intend to apply this understanding in developing and funding social programs to engage participants and communities in the decision-making processes of organizations.

V. Course Requirements

Class preparation, participation & tutoring -The School of Social Work and this instructor take seriously our obligation to educate students in the basic knowledge and competencies of social work management and leadership. Regular attendance, diligent preparation and thoughtful participation are essential to achieving these educational outcomes. Class members are expected to come to class on time each week, having read assigned material, prepared to enter into reflective discussion, and willing to participate actively in class exercises. Because the material calls on the use of skills not as commonly exercised by social work students, the instructor is available for special tutoring for class members who attend regularly but need additional coaching/tutoring in specific course concepts.

Assignment Option 1 – Analyze and assess the fund raising capacity of a local nonprofit organization and make recommendations. .

Or-

Assignment Option 2 – Research potential funding sources (through print and electronic resources) and write a grant proposal to fund a social program including a multi-year budget developed on a computer spreadsheet.

Team option – Either assignment may be undertaken by a team (2-4 people) of class members rather than by individual student. Team projects must be more extensive in both analysis and depth and detail.

VI. Required Texts-

Winning Grants Step-By-Step, Mim Carlson, Jossey-Bass, San Francisco, 2002.

Packet available at Bookstore

Other readings assigned in class

VII. Course Content- Topics and Readings

Week 1

- 1) Introductions and Class Overview
- 2) Small group discussion- Experiences w/Philanthropy
- 3) Individual questionnaire
- 4) Sources of financial support for human service agencies
- 5) Assessing organizational fund raising strength
 - a) Positioning the agency
 - b) Determining your message
 - c) Record keeping
 - d) Ethics
- 6) Ethical Issue: "Broken Trust"

Readings for Week 2

Packet- Temkin,
Boards, Strategic
Thinking, and the Need
for Diversified Revenue
Red Faces at the Red
Cross: CBS News.com
The Battle Inside the
Red Cross: CBS
News.com

- 1) Foundations: Trends in
Joanne Walz,
Foundation
- 2) Grant writing
 - a) Video "Preparing
Proposal"
 - b) Writing Tips
 - c) 10 Reasons Why
Doesn't Get Funded

Readings for Week 4

- 1) Packet- Robinson,
How Can You Gain
Your Donors' Trust?
(Packet)
- 2) Text- Carlson,
Chapters 1-5,
Winning Grants
Step-By-Step
- 3) Carson,

Week 2

- 1) Assessing Your Board and Staff
 - a) Assembling an Effective Team
 - b) Deciding on a Development Strategy
- 2) Trust and Accountability: Keeping Faith With Our
Donors

Readings for Week 3

- 1) Packet- Henley &
Hodiak, Ch. 6 –
"Major Gifts", Fund
Raising & Marketing
in the One-Person
Shop (Packet)
- 2) Kiritz and Mundel,
"Program Planning
and Proposal"

Week 3

2004 and Beyond:
Minneapolis

Your Agency

Your Organization

Week 4

- 1) Philanthropy in Diverse Communities: Atare
Agbamu, Community Leader, LBFE Board Member
- 2) Major gifts and Individual donors
 - a) Acquisition and Direct Mail
 - b) The 7 Faces of Philanthropy
 - c) Building Relationships with Major Donors
 - d) In-Class Gift Solicitation Exercise

Readings for Week 5

- 1) Text – Carlson, Chapters 6-12
- 2) Additional reading distributed in class

Week 5

- 1) Additional Methods for Procuring Financial Resources
 - a) Planned Giving, Endowments and Investments: Mary Ellis Peterson, Minneapolis Foundation
 - b) Capital/Special Gift Campaigns
 - c) Special Events

SAMPLE