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Fundraising Theory and Practice: Level 1

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This course focuses on the theory and practice of fund development and the foundations for philanthropic activity.

Learning Outcomes

Students will:

- * have a general grasp of the History of Philanthropy and the current climate for fund development.
- * have a general understanding about the role of the fund development office and the skills required to be a professional in the field.
- * have a general understanding about the various methods of fundraising.
- * be able to develop a case statement and a fund raising strategy based on analysis, budgeting and decisions on which fund raising method is appropriate and why.
- * be able to identify ethical dilemmas.

Course Content

- * History of Philanthropy, North American giving trends with an emphasis on Canada.
- * Fund development as a profession including skills required, codes of ethics, relationships with the rest of the organization.
- * Mission, vision and values of charities are outlined and using these elements student will learn how to develop a case statement.
- * Presentation on fund raising campaigns including capital, endowment and annual. Discussion of the differences in each and where each might be used.
- * Presentation on fund raising techniques including person to person asks, telephone solicitation and direct mail. Discussion of where and how to use each of these techniques.
- * Presentation on goal setting and estimating fund raising costs. Discussion and group work.
- * How to write a fund raising strategy and implementation plan. Presentation and practice.
- * Ethics of fund development. Review and interpretation of Codes of Ethics. The difference between ethical dilemmas, illegal acts and unethical behavior. Case Studies and discussion.

Learning Methodologies

Books, articles, lectures, readings and small group discussions, individual and classroom exercises.

Outline

Day One

1. Introductions
2. Review course description & timetable
3. History of Philanthropy
4. Canadian Charities & Giving by Canadians
5. Fund Development: A profession
6. Mission Vision & Values
7. Types of Campaigns/Gifts
8. Fund raising methods
9. Winning Grants
10. Roles of staff/volunteers/boards

Day Two

1. Prospect Research
2. Donor Motivation
3. Goal Setting
4. Fund raising costs
5. Planning
6. Implementing the plan
7. Personal solicitations

Day Three

1. Major Gift programs
2. Integrating programs
3. Managing the process
4. Evaluation and analysis
5. Leadership
6. Ethics
7. Role of Fund Raising in your organization

Patricia Hardy, MA, ACFRE (Instructor)
The Tunnelwood Group

- Worked in the field of philanthropy since 1981 as a Division Director with the United Way of Winnipeg; Director of Development for the Ontario Division of the Canadian National Institute for the Blind. Started a consulting firm in 1992 and has worked with CNIB's Nationwide Capital Campaign, the University of Winnipeg, Manitoba Clearinghouse, Winnipeg Film Group, Floating Gallery, The Centre for Rupert's Land Studies, National Screen Institute, University of Manitoba, the International Institute for Sustainable Development, Plug In Institute for Contemporary Art, National Aboriginal Diabetes Association, Center for Indigenous Environmental Research, Manitoba School Improvement Program, Shakespeare in the Ruins and Steinbach Christian Schools.
- Taught fund raising courses to people from Fiji, Kenya, Uganda, Nigeria, India, Nepal, Ghana, the Czech Republic, the Slovak Republic and across Canada.
- received designation from the Association of Fundraising Professionals as a Certified Fund Raising Executive (CFRE) in 1992 and in May, 1999 became the first ACFRE in Canada and the 39th in the world
- Professional associations have included CASE, CCAE (Canadian Council for the Advancement of Education), CAGP (Canadian Association of Gift Planners), AFP (Association of Fundraising Professionals), ARNOVA (Association for Research on Nonprofit Organizations and Voluntary Action)
- Volunteer with the Association of Fundraising Professionals and has served as a delegate to the International Assembly of AFP; a member of the International Development Committee for AFP; member of the AFP Finance Committee; board member for the AFP foundation; member of the Canadian Council; chair of the Canadian Council Task Force on Education; appointee to the CFRE Board; a member of the Continuing Education Review Board; Member of Practise Analysis Task force and as a founding member of the Manitoba Chapter of AFP. In 2000, the Manitoba AFP established the Patricia Hardy

Scholarship for Professional Advancement in recognition of her contribution to the community

- Founding member of Leave a Legacy (Manitoba) and founding Chair of the Leave a Legacy Marketing Committee
- Presented workshops at various conferences including the Association for Fundraising professionals international conference in San Diego and Toronto
- Holds a BA (History) from The University of Winnipeg and an MA (Philanthropy and Development) from St. Mary's University of Minnesota and is certified as a Master Teacher by the Centre for Philanthropic Studies at Indianapolis University, Indiana.
- Lives north of Winnipeg on a ranch with her artist husband Tim, three dogs, five horses and four cats.