



Course title: Grant Writing and Fundraising
Course #/term: SW 663 Fall 2021
Time and place: Wednesday, 5pm-8pm, remote due to COVID
Credit hours: 3
Instructor: Sue Ann Savas, MSW
Pronouns: She/her/hers
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Cell: 734-649-6776
Office hours: By appointment, by phone, or zoom, and after class sessions

1. Course Statement

a. Course Description

Social impact organizations secure resources through a variety of methods, including fees, grants, contracts, financial gifts, in-kind (non-cash) contributions, and investments. This course involves assessing an agency's resource mix and developing tactics and strategies to sustain or expand its revenue streams. Students will explore the range of possible income sources that organizations can allocate to advance social justice by expanding and improving services, empowering groups, reaching populations in need, improving social conditions or anticipating and responding to new challenges. The implications of using alternative approaches of income generation and of changing the income mix will be analyzed in terms of mission accomplishment, program viability, adherence to ethics and values, and organizational sustainability. Skill development will be emphasized in areas such as grant seeking, proposal writing, donor development, direct solicitation of gifts, service contracting, and strategically communicating mission. Students will learn how to identify prospective funding sources, build relationships with potential donors, funders and collaborators, write, package and submit grant proposals, and communicate strategically. This course will also address emerging and changing trends in philanthropy.

b. Objectives

Upon completion of this course, students will be able to:

1. Identify appropriate funding strategies that support financial sustainability of an organization.
2. Locate appropriate funding sources for programs, projects, and identified organizational and community needs.
3. Cultivate, steward, and sustain mutually beneficial relationships with potential funders, donors and other stakeholders.
4. Write, package and submit proposals that are technically complete and contribute to social equity.
5. Distinguish between the advantages and disadvantages of funding sources and strategies in terms of mission, program achievement, ethics, and organizational sustainability.
6. Explore ethical concerns related to applying for, accepting, and managing grants, as well as philanthropy and fundraising.

c. Design

The instruction in this course uses experiential and inclusive pedagogy that encourages the development of solutions to relevant problems in the field. The course's design includes such instructional methods as mini lectures case studies, in-class exercises, and applied assignments. In addition, there is an emphasis on proposal writing and group project planning and implementation. Guest speakers may join classes when relevant.

d. Intensive Focus on Privilege, Oppression, Diversity and Social Justice (PODS)

This course integrates PODS content and skills with a special emphasis on the identification of theories, practice and/or policies that promote social justice, illuminate injustices and are consistent with scientific and professional knowledge. Through the use of a variety of instructional methods, this course will support students developing a vision of social justice, learn to recognize and reduce mechanisms that support oppression and injustice, work toward social justice processes, apply intersectionality and intercultural frameworks and strengthen critical consciousness, self-knowledge and self-awareness to facilitate PODS learning.

Strategies for socially equitable and inclusive practices will be explored and developed so that all resource development contributes to social justice and social change. Students will review the growing body of evidence about privilege in relation to philanthropy, and how traditional mechanisms of philanthropy, grant making and fundraising can contribute to and normalize oppression and marginalization. Course content, discussion, and assignments will address the ways in which populations that traditionally have experienced marginalization can be disproportionately negatively affected by the activities of fundraising and grant making, as well as the role of social workers in disrupting existing structures.

2. Class Requirements

a. ONLINE Textbooks and Other Resources

Clarke, C (2009). Storytelling for Grantseekers: A guide to creative nonprofit fundraising (2nd ed). San Francisco, CA: Jossey-Bass. Via UM library: <https://ebookcentral.proquest.com/lib/umichigan/detail.action?docID=413097>

Zimmerman, S. and Bell, J. (2014). The Sustainability Mindset: Using the matrix Map to Make Strategic Decisions, Hoboken, NJ: John Wiley and Sons. Via UM Library: <https://ebookcentral.proquest.com/lib/umichigan/detail.action?docID=1800876&query=nonprofit+sustainability>

Klein, K (2016). Fundraising for Social Change (7th ed). San Francisco, CA: Jossey-Bass. Via UM library: <https://ebookcentral.proquest.com/lib/umichigan/detail.action?docID=693500&query=fundraising+for+social+change>
NOTE: This short text will be read independently by students to inform their financial sustainability case study group project.

Students will routinely make use of these online resources:

Chronicle of Philanthropy: <https://www.philanthropy.com/>

Non-profit Quarterly: <https://nonprofitquarterly.org/>

Stanford Social Innovation Review: <https://ssir.org/>

b. Class Schedule

Date	Topics	Required Readings
1. Sept 1	Introduction to Course, program or project need for grant funding	<ul style="list-style-type: none"> Review Course Syllabus, expectations Foundation Directory online <i>via UM Library</i>
2. Sept 8	Funding eco-system, types of foundations, grant process, matrix elements	<ul style="list-style-type: none"> <u>Text</u>: Clarke, Chapter 1, Getting Ready for Grantseeking <u>Text</u>: Clarke, Chapter 2, Research and relationships: Finding and Cultivating your Audience <i>Ann Arbor Area Community Foundation Annual Report, 2019</i> Election do's and don'ts for private foundations. (2018). <i>Independent Sector</i>.
3. Sept 15	Funder Matrix preliminary findings and analysis, concept paper outline	<ul style="list-style-type: none"> <u>Text</u>: Clarke, Chapter 3, The Short Story: Writing Letters of Inquiry <u>WATCH</u>. Pallotta, Dan. Ted Talk Video: "The Way We Think about Charity Is Dead Wrong" 2013 Friendman, E., Galaich, G., and Infante, P. (2020), There Is No Better Time Than Now for Philanthropy to Spend Itself Out of Existence. <i>Chronicle of Philanthropy</i>
4. Sept 22 Funder Matrix due	Statement of need or condition, using local data	<ul style="list-style-type: none"> <u>Text</u>: Clarke, Chapters 4, The Proposal Narrative: Introducing the Characters and Place <u>Text</u>: Clarke, Chapter 5: The Need or Problem: Building Tension or Conflict into your Story Fritz, J. How to write an effective needs statement for your grant proposal. <i>The Balance Small Business</i>.
5. Sept 29	Specification of the program or project, logic models	<ul style="list-style-type: none"> University of Michigan <i>Grant Writer's Toolkit</i> Callahan, D. (2020). Philanthropy in the 2020s: 16 Predictions. <i>Inside Philanthropy.com</i>
6. Oct 6	SMART objectives, Concept paper peer review	<ul style="list-style-type: none"> <u>Text</u>: <u>Clarke</u>, Chapters 6, Goals, Objectives and Methods SAMSA Native Connections. Setting Goals and Developing Specific, Measurable, Achievable, Relevant, and Time-bound Objectives.
7. Oct 13 Concept paper due	Full proposal outline	<ul style="list-style-type: none"> CART Principles Right Fit Evidence. <i>Innovations for Poverty Action</i>. Nonprofit Whisperer: Building a Culture of Philanthropy (2018).
8. Oct 20	Evaluation plans, expected outcomes, data tracking indicators	<ul style="list-style-type: none"> <u>Text</u>: Clarke, Chapter 7: Evaluation and Future Funding Measuring Outcomes. <i>Madison Community Foundation</i>. Step by Step Guide to Evaluation. <i>WK Kellogg Foundation</i>. Evaluation Community Change: A Framework for Grant Makers. <i>Grantmakers for Effective Organizations</i>

Date	Topics	Required Readings
9. Oct 27	Grant budgets and in kind contributions	<ul style="list-style-type: none"> • <u>Text</u>: Clarke, Chapter 8: The Budget, Translating your Story from Words to Numbers • https://www.grantadviser.com/budget • What Is General Operating Support and Why Is It Important? (2014) <i>Geo Funders</i>.
10. Nov 3	Proposal polishing, Trends in non-profit funding: challenges and opportunities. Establish case study groups	<ul style="list-style-type: none"> • <u>Text</u>: Clarke, Chapter 9: Summary, titles and headings • McCambridge, R. (2018). NoVo Foundation Announces a \$34 Million Investment in Radical Hope. <i>Nonprofit Quarterly</i>. • <u>Podcast</u>. How philanthropy captures social movements. <i>Tiny Sparks Podcast</i>.
11. Nov 10 Grant Proposal due	Introduction to mission money matrix, profit and impact reviews	<ul style="list-style-type: none"> • <u>Text</u>: Zimmerman Chapters 1-6 • Anft, M. (2020). How One Social Justice Organization Diversified its Revenue: A Case Study. <i>The Chronicle of Philanthropy</i> • <u>Podcast</u>. Is big philanthropy destroying democracy? <i>Nonprofit Quarterly</i>
12. Nov 17	Mapping the MMM results, revenue generators, equity and ethics	<ul style="list-style-type: none"> • <u>Text</u>: Zimmerman Chapters 7-11 • <u>Podcast</u>. Winners give more but their giving reinforces elite power. <i>Nonprofit Quarterly</i>. • Social Enterprise Grants for your Consideration. (2019). <i>Global Peace Careers</i>. • Overcoming Racial Bias in Philanthropic Funding. (2020). <i>Stanford Social Innovation Review</i>. • Online Fundraising Compliance Guide. <i>Harbor Compliance</i>
Nov 24	No Class	University Holiday
13. Dec 1	Case study group consultations with instructor by appointment	<ul style="list-style-type: none"> • Consultants Working in Philanthropy: The Bridgespan Group. https://www.bridgespan.org/ • So, you want a job in philanthropy. <i>Philanthropy New York – A Regional Association of Grantmakers for Global Impact</i>
14. Dec 8 Sustainability Case Study due	Case Study Group Presentations	<ul style="list-style-type: none"> • Peer review of presentations
Dec 14, 5pm (exam week): Final group project slides due, submit to canvas		

c. Assignments

Students will have an opportunity to share their assignments and gather feedback on their deliverables from their group members and the instructor. Individual student work products/assignments will be **uploaded to canvas for grading**.

Assignment	Due date	Percent of overall grade
1. Funder Matrix	Sept 22	15%

2. Grant Concept Paper	Oct 20	15%
3. Grant Proposal	Nov 17	20%
4. Sustainability Case Study Group Project	Dec 8	30%
Class Participation	Instructor rating	20%

Funder Matrix

This assignment was designed to align with these two course objectives: *To identify appropriate funding strategies that support financial sustainability of an organization, and to locate appropriate funding sources for programs, projects, and identified organizational and community needs.* Students will identify a program or project of interest in need of funding. Students will use Foundation Directory and other online resources to identify 5 funding sources with high potential. The student will gather details about each funder such as geographic focus, population, funding focus, grant award history, relationship with funder, evaluation and reporting requirements. The results will be presented in a matrix (rows and columns), one-page, landscape format, with 9 to 10-point font. The funder with the highest potential will be presented at the top of the matrix, with the lowest potential presented at the bottom. Students will include a 1-2 page analysis of their findings, including funding source recommendations.

Grant Concept Paper

Students will identify a host organization and program/project in need of funding. Individually, students will write a 2-page concept paper in response to a set of guiding questions provided by the instructor. The concept paper assignment will be used to develop the fuller grant proposal assignment.

Project/Program Grant Proposal

This assignment and the concept paper assignment is designed to align with three course objectives: *To identify appropriate funding strategies that support financial sustainability of an organization, and to write project proposals that are technically complete and contribute to social equity, and to explore ethical concerns related to applying for, accepting, and managing grants, as well as philanthropy and fundraising.* Individually, students will write a 5-6 page grant proposal for the host organization. The instructor will provide the grant outline and the guiding questions.

Sustainability Case Study Group Project

This assignment is designed to align with these course objectives: *To distinguish between the advantages and disadvantages of funding sources and strategies in terms of mission, program achievement, and organizational sustainability, and to explore ethical concerns related to applying for, accepting, and managing grants, as well as philanthropy and fundraising.* Students will work together to identify one host organization/one program to focus on. Students will complete a brief financial and impact review of the program using the mission money matrix process. The students will assess the program's resource mix and developing tactics and strategies to sustain or expand its revenue streams, including fees, grants, contracts, financial gifts, in-kind (non-cash) contributions, and investments. Students will develop a plan for advancing the financial sustainability of the program, and thereby, reducing financial risk. Students will explore the range of possible income sources that organizations can allocate to advance social justice by expanding and improving services, empowering groups, reaching populations in need, improving social conditions or anticipating and responding to new challenges. Results will be presented to the class using 12-15 slides.

d. Attendance and class participation

Class attendance is imperative for both your own learning and the learning of your peers, and certainly for my learning. I expect students to attend class and small group project sessions. If personal or professional circumstances require your absence from more than one class, please contact me as soon as possible. Note that, even if you are absent from a class, you are still responsible for the content and the required assignments due that day. Please review the [Policy on Class Attendance](#) found in the MSW Student Guide. Class participation is more than attending the sessions. Participation includes preparation for class by doing the readings and completing draft assignments. Participation includes asking questions of the instructor and of your classmates. Participation includes contributing fully to your group.

e. Grading

Final grades are based on 100 percentage points. Letter grades are assigned to point totals according to the points listed in the grade chart below. Assignments are due on or before the dates listed on the syllabus and on Canvas, except where noted. Please submit all work on time. Except where indicated, late assignments will be penalized 1/3 of a letter grade for the first day past the due date and time, and a full letter grade for each additional day thereafter. I am not inclined to waive this policy, though I do understand there may be exceptional circumstances. Note: assignments are due by 5pm.

Additional MSW policies are available in the Student Guide: [Grades in Academic Courses and in Field Instruction](#), [Student Grievance procedures](#), [policy for grading in special circumstances](#).

100	A+	88-90	B+	78-80	C+	68-70	D+
94-99	A	84-87	B	74-77	C	64-67	D
91-93	A-	81-83	B-	71-73	C-	<64	E

f. Class Recording and Course Materials

Audio and video recording of in-class lectures and discussions is prohibited without the advance written permission of the instructor. Students with an approved accommodation from the Office of Services for Students with Disabilities permitting the recording of class meetings must present documentation to the instructor in advance of any recording being done. The instructor reserves the right to disallow recording for a portion of any class time where privacy is a special concern. If the instructor chooses to record a class, they will decide which classes, if any, are recorded, what portion of each class is recorded, and whether a recording is made available on the course management website. On days when classes are recorded, students will be notified a recording is occurring. Class recordings and course materials may not be reproduced, sold, published or distributed to others, in whole or in part, without the written consent of the instructor.] Additional information on class recordings can be found the [Recording and Privacy Concerns FAQ](#)

g. COVID-19 Statement, updated 09/21

For the safety of all students, faculty, and staff on campus, it is important for each of us to be mindful of safety measures that have been put in place for our protection. Your participation in this course is conditional upon your adherence to all safety measures mandated by the state of Michigan and the University, including [properly wearing a face covering in class](#) and compliance with the [University COVID-19 Vaccination Policy](#). Other applicable and additional safety measures may be described in the [Campus Maize & Blueprint](#). Your ability to participate in this course may be impacted by failure to comply with campus safety measures. Individuals seeking to request an accommodation related to the face covering requirement under the Americans with Disabilities Act should contact the [Office for Institutional Equity](#) and those seeking an exemption related to the vaccination requirement should submit an exemption request

through [WolverineAccess](#). I also encourage you to review the [Statement of Student Rights and Responsibilities](#) and the [COVID-related Addendum to the Statement of Student Rights and Responsibilities](#).

h. Health Related Class Absences

Students who miss class due to illness of any kind will be given opportunities to access course recorded sessions. Please notify me by email about your absence as soon as practical, so that I can make accommodations. Please note that documentation (a Doctor's note) for medical excuses is *not* required.

Additional School and University policies, information and resources are available here:

<https://ssw.umich.edu/standard-policies-information-resources>. They include:

- *Safety and emergency preparedness*
 - *Mental health and well-being*
 - *Teaching evaluations*
 - *Proper use of names and pronouns*
 - *Accommodations for students with disabilities*
 - *Religious/spiritual observances*
 - *Military deployment*
 - *Writing skills and expectations*
 - *Academic integrity*
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Instructor Teaching Philosophy. Adapted from Rosenshine, B. *Research-based Strategies that All Teachers Should Know*, American Educator (Spring 2012).

I will begin each session with a review of what was covered the previous lecture. Students will be asked to provide the review of key concepts and "take-aways." I will present material in small steps and provide class time for students to practice after each step. I will give clear instructions. I will provide models, templates and numerous examples of problem-solving, including rehearsal time. I will think aloud as I demonstrate. I will provide scaffolds for difficult tasks and notify students of possible errors. I will guide student practice through additional explanations, live review of drafts, and small group consultations. I will monitor students for understanding by asking specific questions and checking student responses. I will reteach material when necessary. I will teach material needed by students even when the students were expected to have mastered the material prior to the course. I will note student successes and give students ample opportunity to practice independently. I will provide feedback as students begin to practice independently. I will teach using a transparent and inclusive approach.

I use an engaged active learning approach and partner with the community to address real social work related challenges. In addition to the course objectives and the CSWE competencies, we work to develop the following University of Michigan engaged learning student outcomes: (1) self-agency and innovation, (2) collaboration, communication, and teamwork, (3) social/civic responsibility and ethical reasoning, (4) intercultural engagement, (5) creativity.