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Fundraising Theory and Practice: Level II

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This course focuses on the art & science of fund development and the foundations for philanthropic activity.

Learning Outcomes

Students will:

- < Gain an understanding of what Philanthropy is and be able to articulate what it means to them and how it is practiced in their own organizations.
- < Gain an understanding of the science of year round fund development and the art of year round cultivation and stewardship.
- < Gain an understanding about developing and implementing various methods of fundraising and an understanding of the science of accepting various types of gifts (including cash, property, securities, bequests).
- < Be able to develop an annual operational plan and a fund raising strategy based on analysis, assessment and strategic thinking.

Course Content

- * Definitions of Philanthropy, Development, Fundraising and discussions of current issues around philanthropy

- * The Fund raising cycle; strategic thinking; paper versus people fund raising; managing the day to day activities.

- * Gift planning for outright and deferred gifts

- * How to make cultivation and solicitation visits and phone calls.

- * How to write a year round campaign plan including strategy, implementation, policies and procedures.

- * Discussions of fundraisers as leaders and agents of change.

- * Ethics of fund development. Case studies and discussion.

Learning Methodologies

Reading assigned articles, lectures, videos, small group discussions, individual and classroom exercises.

Optional Textbook

Achieving Excellence in Fund Raising, Henry A. Rosso, (1991)

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; as the CNIB's Executive Director, Nationwide Capital Campaign; as the Director of Development for the University of Winnipeg; as the Director of Fund Development and Outreach with the International Institute for Sustainable Development
- Taught fund raising courses to people from Fiji, Kenya, Uganda, Nigeria, India, Nepal, Ghana, the Czech Republic, the Slovak Republic and across Canada and has a Master Teaching Designation from AFP and the Indiana School of Fundraising
- 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.

- Founding member of Leave a Legacy (Manitoba) and founding Chair of the Leave a Legacy Marketing Committee
- Volunteer activities include work for the National Aboriginal Diabetes Association, Winnipeg Film Group, Floating Gallery, The Centre for Rupert's Land Studies, Plug In Institute for Contemporary Arts, National Screen Institute, mentor to newcomers to the field of fund raising
- Presented workshops at various conferences including the Association for Fundraising professionals international conference in San Diego and Toronto
- Has 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.