

MARK 7397: Marketing for Nonprofit Organizations

Tuesday 6:00 to 9:00 p.m.

Delivery: Synchronous Online (SY) via zoom

Fall 2022, UH Bauer, Department of Marketing & Entrepreneurship

Instructor: Rodi Franco * rlfranco@central.uh.edu * cell:713-305-7793

Course Description:

Every nonprofit organization must create and maintain relationships with stakeholders, beneficiaries, and volunteers to achieve their mission and maintain their relevancy and viability. Like for-profit companies marketing is central for organizational performance. However, nonprofit executives face unique marketing challenges including limited resources, complex and often obscure benefits, lofty education and advocacy goals, and multiple diverse audiences.

Course Structure:

- This course will introduce marketing theories that are useful to creating effective and efficient marketing plans and activities for nonprofit organizations. Readings will be posted from a variety of sources. Students will be asked to submit thoughts on readings and be prepared to discuss.
- Students will connect with nonprofit managers to learn about real-world marketing issues and solutions for nonprofits.
- Feedback on writing will be provided to students throughout the course.
- A case study will allow students to apply learnings and present recommendations as a team. Feedback on both content and communication will be provided.

There are three major assignments:

- Identify and schedule an interview with a nonprofit executive to explore marketing challenges. Write up findings and make a related recommendation.
- Write a formal solicitation for a major gift and a thank you letter confirming fund usage.
- A final group project on a real-world nonprofit will allow students to work in teams to develop a marketing recommendation and present using PowerPoint slides online.

There will be a midterm to check concept knowledge. It will be a take home, open book exam.

Attendance is mandatory for this course – with video turned on. Participation will be measured by:

- class attendance and participation
- thought questions on readings
- written preparation for guest speakers

Syllabus as of 4/8/2022. Updates will be made through the semester.

Students are responsible for being aware of changes posted on teams and discussed in class.

Instructional Philosophy and Course Logistics

- This course will have a mix of lecture, discussion, and will connect students with professionals within the classroom and through assignments.
- Because we are meeting online and this is a small class designed to be highly interactive, **IT'S ESSENTIAL THAT YOU ATTEND CLASS AND PARTICIPATE IN DISCUSSIONS.** As a courtesy, if you know that you're going to be absent, please email me.
- For our online classes, we will meet via Zoom. The link will be provided on Blackboard. As a courtesy to others, please mute yourself unless you're speaking. **And throughout class, YOU MUST KEEP YOUR VIDEO ON and consider that others can and want to see you!**
- Class information and readings will be posted on Teams. There are two readings that must be purchased through Harvard Business Publishing Education and one book that must be purchased through Amazon – on kindle or paperback. (Details on next page of syllabus.)
- **The best way to contact me is to contact me through Blackboard or email me directly at rlfranco@central.uh.edu. You may also text me at 713-305-7793.** Please identify yourself in the text. I will post lecture slides online after the class because I want you to actively take notes during class and use the slides to review what you might have missed.
- If we need to cancel a class, it will be replaced with a lecture available to view online. Questions testing comprehension of that lecture must completed and will count toward your participation grade.
- I will communicate with the class through announcements made via blackboard as well as Teams. You must be sure that you can receive notifications to your preferred email from both platforms.
- Homework such as thought questions, prep for speakers, and the draft of the email for assignment 1 is submitted through Teams. Graded assignments and midterm are submitted through Blackboard.

Material to be purchased

You must purchase 2 articles/cases from Harvard. The link to purchase **TBD**

Most of the course readings will be available online under files on Teams. But please purchase the following book on Kindle or paperback through Amazon: Leroux Miller, Kivi, *The Nonprofit Marketing Guide*, Jossey-Bass, **2021**. (Be sure to buy the second edition)

Syllabus Changes

Due to the changing nature of the COVID-19 pandemic, modifications to the course syllabus may be necessary. Notice of changes will be announced as quickly as possible through Teams. Be sure you can receive announcements in your preferred email address through Teams.

The information contained in this class syllabus is subject to change without notice. Students are expected to be aware of any additional course policies presented by the instructor, during the course.

Note: There will be no class on Oct. 4. Instead, there will be a recorded lecture and questions due as homework on that lecture, which will count toward your participation grade.

Syllabus as of 4/8/2022. Updates will be made through the semester.

Students are responsible for being aware of changes posted on teams and discussed in class.

Assignments and Grades

Class participation/Homework: 25%

Especially because we will not be using a textbook and because this is a seminar-based discussion course, I expect students to attend classes and to fully participate. That means, sitting, ready to work, with video turned on, and a working microphone. I will severely reduce points for absence or lack of full participation.

Part of your participation grade are thought questions based on our readings. You will be expected to give single page answers – several paragraphs. **Be sure to share your opinion, reaction, and reflections on the readings.** These assignments are due prior to the start of class. Occasionally we will break into groups so you can discuss what you've written with other students. I will often give you feedback on your written communication skills, so your thought question responses should be written in full sentences.

Additional assignments to prepare you for our guest speakers will be assigned and will also count toward your participation grade.

Homework questions based on Oct. 4 recorded lecture will also count toward your participation grade.

Assignment 1: 25%

This will be an individual experience for each student. The goal is for you to interview a nonprofit executive to identify marketing (and or fundraising) challenges and develop potential recommendations to achieve a marketing goal or addressing a challenge discussed. This assignment is directly related to “informational interviewing,” which most of you will do when seeking a job. Ideally the nonprofit executive has the title of marketing director/manager or development director/manager, but program managers might also be appropriate. The nonprofit organization MUST BE A 501C3. The written portion of the assignment, a reflection paper, should be 4 to 5 pages in length.

Steps for successfully completing this assignment:

1. Research the mission/vision statement as found on the organization's website and identify a person who you will be able to contact to request an interview.
2. Prior to contacting the company, you must submit the organization and title of the executive, and draft of the email that you will use to initially contact the manager. You will ask for a brief 30-minute conversation to learn about two marketing challenge for this organization – no more than one that is specific to operating during the pandemic.
3. Once I approve your email, you will send the email and if possible, follow up with a phone call to set a meeting. If, you are unsuccessful in obtaining a meeting, let me know and I will connect you with a colleague of mine. Deadlines will be confirmed when this assignment is given – draft deadlines are in this syllabus.
4. Once your meeting is set, but before your meeting, you may send me a draft of the questionnaire guide that you will use to conduct your interview for my review/comments. Sending the draft to is optional. The final questionnaire guide is due with your reflection paper.

Syllabus as of 4/8/2022. Updates will be made through the semester.

Students are responsible for being aware of changes posted on teams and discussed in class.

5. You must follow up with a thank you email to the nonprofit executive within 24 hours of your conversation. Please copy me on that email so that I know that you've had your meeting.

The reflection paper for this assignment is worth 15% of your grade. The process which includes the email draft, questionnaire guide, and thank you email is worth 10% of your grade.

Assignment 2: 20%

This is a two-part writing assignment.

- Part I: Write a one- or two-page solicitation letter addressed to a potential major donor. Within the letter, I want to see storytelling, reference to/articulation of the mission statement, an ask/call to action, and directions on the action steps you want the prospect to take.
- Part II: Write a follow up thank you note that is specific to the individual and articulates how that donor or volunteer will have a positive impact through the gift that they've made.

This assignment will be due the week after we cover Donors Communications and Plans.

Mid-term: 10%

A take home midterm will be given after Unit 9.

Group Assignment 3: 20%

This is a group project, which will allow students to apply their knowledge to create marketing recommendations and marketing messages that address a nonprofit's goals. Teams will be able to choose to create plans that target donor/funder and users. There will be two different cases for this assignment, a Harvard Business case for a social service organization and a tribute concert of Selena music at the Houston Symphony. I will try to honor your preference when assigning you to a group.

The specifics for this assignment will be given to the class halfway through the semester. Group grade will be assigned by the instructor. I will strongly take in consideration the participation grade assessed by your teammates, which will be submitted the day after the final class. Part of your grade will be your suggestions for improvement of other groups presentations. If you do not attend the entire final class when presentations are made, your grade for this assignment will be lowered.

General College Information/Services

Academic Honesty

The University of Houston Academic Honesty policy is strictly enforced by the C.T. Bauer College of Business. No violations of this policy will be tolerated in this course. A discussion of the policy is included in the University of Houston Student Handbook which can be downloaded at <http://www.uh.edu/dos/publications/handbook.php>. Students are expected to be familiar with this policy.

Accommodations for Students with Disabilities

The C.T. Bauer College of Business would like to help students who have disabilities achieve their highest potential. To this end, in order to receive academic accommodations, students must register with

Syllabus as of 4/8/2022. Updates will be made through the semester.

Students are responsible for being aware of changes posted on teams and discussed in class.

the Center for Students with Disabilities (CSD) (telephone 713-743-5400), and present approved accommodation documentation to their instructors in a timely manner.

Availability of Counseling Services

Counseling and Psychological Services (CAPS) can help students who are having difficulties managing stress, adjusting to college, or feeling sad and hopeless. You can reach CAPS (www.uh.edu/caps) by calling 713-743-5454 during and after business hours for routine appointments or if you or someone you know is in crisis. CAPS is holding both in person and phone/video appointments.

Excused Absence Policy

Regular class attendance, participation, and engagement in coursework are important contributors to student success. Absences may be excused as provided in the University of Houston [Undergraduate Excused Absence Policy](#) for reasons including: medical illness of student or close relative, death of a close family member, legal or government proceeding that a student is obligated to attend, recognized professional and educational activities where the student is presenting, and University-sponsored activity or athletic competition. Under these policies, students with excused absences will be provided with an opportunity to make up any quiz, exam or other work that contributes to the course grade or a satisfactory alternative. Please read the full policy for details regarding reasons for excused absences, the approval process, and extended absences. Additional policies address absences related to [military service, religious holy days, pregnancy and related conditions, and disability](#).

Recording of Class

Students may not record all or part of class, livestream all or part of class, or make/distribute screen captures, without advanced written consent of the instructor. If you have or think you may have a disability such that you need to record class-related activities, please contact the [Center for Students with Disabilities](#). If you have an accommodation to record class-related activities, those recordings may not be shared with any other student, whether in this course or not, or with any other person or on any other platform. Classes may be recorded by the instructor. Students may use instructor's recordings for their own studying and notetaking. Instructor's recordings are not authorized to be shared with anyone without the prior written approval of the instructor. Failure to comply with requirements regarding recordings will result in a disciplinary referral to the Dean of Students Office and may result in disciplinary action.

Syllabus as of 4/8/2022. Updates will be made through the semester.

Students are responsible for being aware of changes posted on teams and discussed in class.

Course Schedule:

This is subject to change based on availability of speakers and other issues.

PART 1 BUILDING CONCEPTS/ASSIGNMENTS 1 AND 2	
Unit 1	Course introduction, Unique marketing challenges for nonprofits
August 23	<ul style="list-style-type: none"> • Syllabus and grading • Mission often has strong educational component (e.g. influence attitudes, advocacy) • Multiple sources of revenue: individual donors, corporations/foundations, in-kind, earned income
	Readings <ul style="list-style-type: none"> • Nonprofit Impact Matters • How nonprofit leaders can keep their organizations afloat Thought Question 1 Due after first day of class: What things surprised you in this reading? Name at least 3 and explain.
Unit 2	Target Audiences
August 30	<ul style="list-style-type: none"> • Multiple target audiences: customers/users/beneficiaries, donors, volunteers (and sometimes partners) • Conflict between audiences' desires/understood needs and the organizations' goals
	Readings <ul style="list-style-type: none"> • Interview of Philip Kotler by Peter Drucker, from Managing the Nonprofit Organization Thought Question 2 due: Kotler coined the idea of STP, "Segmenting, targeting, and positioning." Define these three concepts. Look at past marketing course notes and beyond this reading to review these concepts. What role does Kotler think marketing should play in successful nonprofits? What is your reaction to the reading? Does anything surprise you or confirm your belief(s) about marketing?
Assignment 1	Choose the nonprofit you want to research for assignment 1 and identify a person that you can ask to speak to with his/her contact info.
Unit 3	Goals and strategies of marketing for a mission-driven not-for-profit organization
September 6	<ul style="list-style-type: none"> • The difference between vision, mission, and goals • SMART goals Important to understand the difference between business goals and marketing goals.
	Reading: Skim Being Nonprofit-Like in a Market Economy by Matthew Sanders. Thought question 3 due: What are the tensions for nonprofit organizations to pursue their social missions and meet the demands of a market economy?
Assignment 1	Due 9/6: Draft email requesting a meeting with nonprofit executive
Unit 4	Strategy
September 13	<ul style="list-style-type: none"> • Organizational Strategies and relationship to Marketing Strategies • How nonprofits compete and define their position • SWOT • Marketing strategies for nonprofits that support revenue growth
	Watch Michael Porter video. https://www.youtube.com/watch?v=3Hd88eBgkw0 Thought question 4 due: What recommendations does Porter make?
	Discuss how to approach assignment 1 and catch up course to date

Syllabus as of 4/8/2022. Updates will be made through the semester.

Students are responsible for being aware of changes posted on teams and discussed in class.

Assignment 1	You must have an interview scheduled by 9/16 at 5 p.m. If you don't have an appointment set, contact me and on 9/16 I will assign a contact for you who has agreed to meet with a student in this class. Optional: Send me draft of questionnaire guide to review prior to your meeting.
Unit 5	Branding
September 20	<ul style="list-style-type: none"> • Connection of brand with mission • Difference between Brand as a strategic asset vs. brand as tactical identity elements.
	<p>Readings</p> <ul style="list-style-type: none"> • Article: Role of the Brand in Nonprofit Sector and Chapter 1 of The Brand IDEA. Both by Nathalie Laidler-Kylander and Julia Shepard Stenzel • Breakthrough Nonprofit Branding Chapter 1 • Brandraising – chapter on identity. Consider all the tactical elements of brand. (We will discuss in class – do not include in thought question). <p>Thought question 5 due</p> <ul style="list-style-type: none"> • What is the difference between what Laidler-Kyland and Stenzel call the “old” and “new” paradigm? What do you think is driving this shift? Briefly define IDEA. • What is special about “Breakthrough Nonprofit Branding”? • Share your thoughts...For example, did you find one of these readings more interesting/relevant to you? Why?
	Catch up and discuss interviews with executives. Two examples in Breakout sessions: Depelchin and Search
Assignment1	Meet with executive: Sept 19- Sept 30. Send thank you day after meeting.
Unit 6	Marketing Plan and Strategies
September 27	<ul style="list-style-type: none"> • Elements of a Plan • 5 P's in Nonprofit Marketing • Prospect Continuum Model • Direct Response Marketing • Messages and Media Vehicles
	<p>Readings</p> <ul style="list-style-type: none"> • The Nonprofit Marketing Guide (2nd edition) (BUY BOOK) Chapters 2, 6, 7 and 10 • Brandraising, Chapter 6 <p>Thought question 6: Due. What are some of the lessons that each author gives for creating and delivering effective messages?</p>
Assignment 1	Paper due Oct 4
Unit 7	Public Trust –
October 4 NO CLASS Recorded lecture	<ul style="list-style-type: none"> • Understand why nonprofits must concern themselves with how the general public views them instead of just focusing on the perceptions of their organization by their donors and users of their services (beneficiaries).
	<p>Readings:</p> <ul style="list-style-type: none"> • Public Trust in the Public Face of Charities • The Trust Crisis • Americans' Trust in Nonprofits – True Sense

Syllabus as of 4/8/2022. Updates will be made through the semester.

Students are responsible for being aware of changes posted on teams and discussed in class.

	<ul style="list-style-type: none"> • Trust in Civil Society <p>Thought question 7 due: What recommendations are made in the readings about what nonprofits must do to maintain and build public trust.</p>
Unit 8	Donor Communication and Plans
October 11	<ul style="list-style-type: none"> • Organizational structure of development departments • Donor Focused Strategies • Why do people give? • How to build the case for support? • Matching donors with needs and making the ask • Stewardship <ul style="list-style-type: none"> • Readings <p>Asking, by Jerold Panas – excerpts Nonprofit Fundraising 101 – Forward, Chapters 9 and 10 Nonprofit Management 101 – 17 and 18 Nonprofit Marketing Guide – chapters 8 and 9 (BUY BOOK) Donor Focused Strategies for Annual Giving by Karla A. Williams, excerpts Get fully funded – why people give</p> <p>Thought question 8 due. Compare what Jerold Panas recommends with what Lynne Twist says in her forward to Nonprofit Fundraising 101.</p>
Unit 9	Content Marketing and Social Media for Nonprofits
October 18	<ul style="list-style-type: none"> • Unique challenges for implementing content marketing and utilizing social media for marketing nonprofits • Storytelling online
	<p>Reading</p> <ul style="list-style-type: none"> • Content Marketing for Nonprofits by Kivi Leroux Miller, Ch. 3 and 12, and pages 113-114, and 257-166 <p>Thought question 9 due. What are some of the tactics/tips that interest you/surprise you?</p>
Assignment 2	Due 3/24.
October 25	Class: Catch up and review for midterm
Midterm	Will be posted on Blackboard after class. Due at midnight Friday, October 28
Unit 10	Volunteer Management
Nov 1	<p>Volunteer Management Practices and Retention of Volunteers by Mark Hager & Jeffrey L. Brudney, The Urban Institute June 2004</p> <p>Thought question 10 due. What recommendations do they make and how could marketing help their effort? Likely we will have a speaker at this class and you will need to prepare for that speaker. More info to come.</p>

Syllabus as of 4/8/2022. Updates will be made through the semester.

Students are responsible for being aware of changes posted on teams and discussed in class.

PART 2		APPLYING CONCEPTS TO CASES AND GUEST SPEAKERS
Cases for Assignment 3 Nov 8		Creating Marketing Recommendations to Fulfill Marketing Objectives Team Project discussions Read material from both cases (HS on Teams) purchase Harvard Business Material.
		Gwen Watkins, Chief Marketing Officer of Houston Symphony will discuss HS case
		Harvard Business case, The Empowerment Plan (TEP)
Unit 11	Special Topics	
Nov 15 and Nov 22		During these classes we will have guest speakers who will share information about their companies and area of expertise within their companies. Schedule of speakers will be confirmed after the semester begins. Before each class, go to the website and investigate what the organization does and the topic that the speaker will be discussing at that organization. Submit a brief summary of what you learn and 2 questions for the speaker.
Assignment 3 presentations: Nov 29	Group presentation slides should be emailed by one person on your team to me following the class. Assessment of self and team members due 11/30 .	

Syllabus as of 4/8/2022. Updates will be made through the semester.

Students are responsible for being aware of changes posted on teams and discussed in class.