NEUMANN UNIVERSITY
CATHOLIC EDUCATION IN THE FRANCISCAN TRADITION

Center for Leadership

Module Title: "Grantmaking and Fundraising in the Digital Age"

Continuing Legal Education: Issues associated with this module can include: the role of State consumer fraud laws; misrepresentation, fraudulent solicitations and other deceptive practices; registration of nonprofits and professional fundraisers who solicit donations; privacy issues; compliance with State and federal tax deductions requirements, application of IRS gambling rules, communication laws, state charitable fundraising regulations (i.e. IRS Notice 88-120for specific safe harbors for meeting the requirements of section 6113); Section 230 of the Communications Decency Act (CDA), 47 U.S.C., § 230(e)(3) giving providers of interactive computer services immunity from some state law claims; and Substantiation and Disclosure Requirements.
Obtaining advice from attorneys who understand fundraising issues is a client's key to unlocking many opportunities and avoiding unnecessary legal problems.

Module Schedule: Thursday, April 21, 2016
Two Hours of Instruction from 2:00 – 4:00 PM

Required Materials: A workbook with applicable materials, articles, checklists, tables, studies, etc. are provided to each module participant.

Instructors:

- **Richard Fox**, *Partner, Dilworth Paxon, LLP*
- **Benjamin Bolas,** *Associate, Dilworth Paxon, LLP*
- **Alex Rahn,** *Senior Associate, Wanner Associates*
- **Kelly Colvin,** *Associate Director, Temple University Center on Regional Politics; Community Activist and Independent Fundraiser*

Program Title: "Grantmaking and Fundraising in the Digital Age"

Module Description:

Charitable institutions and causes have long been a mainstay in American society, helping to fill the critical gap between government safety nets and economic development programs and ever increasing need. Many funding streams currently appear to be running dry. Lingering economic constraints and volatility from America's great recession, the impact of floundering economies around the world, and the ongoing budget impasse in the Pennsylvania legislature, have highlighted the continuing need for

organizational grantmaking and fundraising. Grantmaking and fundraising are an essential, and fundamental, process to deliver funds, money, or resources to those who qualify. Prime examples of those impacted by the PA state budget impasse include State medical assistance for the poor, State funded health treatment and screening programs and agricultural programs - reportedly all without funding this year.

Overlay these fundraising challenges with the new digital age and the complications become exponentially more difficult. Some organizations neither understand nor employ newly available approaches to fundraising. According to Network for Good, an nonprofit donor-advised fund that uses the Internet and mobile technology to securely and efficiently distribute donations from donors to their favorite charities each year, 90% of fundraising still takes place using traditional methods, but the figure is decreasing every year. The major charitable contributors, baby boomers and millennials, donate in more varied and nontraditional ways, including the ever-present smart phone. Some prefer traditional methods of giving while others look at new, digitally-savvy methods. One of the positive side effects of digital fundraising is allowing the fundraiser to solicit contributions in a more cost effective and efficient way which matches the contributor's budgetary and communication preferences.

As fundraising practices become increasingly digital, nonprofits and other charitable institutions need to engage donors with creative programming. Potential contributors from different generations require innovative and increasingly convenient approaches, using tools never before available. Effective traditional methods are still necessary, but the power of modern digital methods must also be pursued to reach as broad and diverse an audience as possible.

Digital approaches and tools might include newer strategies such as crowdfunding. Some of the top crowdfunding sites identified for non-profits and charities include:
- Indiegogo
- FirstGiving
- Crowdrise
- Causes
- Pozible
- RocketHub
- And others….

Offline, in-person fundraising will most likely continue to be an effective way to raise funds, especially among mega-donors, but it also disproportionately consumes time and human resources. Digital campaigns have paved the way for partnerships between nonprofits and for-profit platforms, allowing digital fundraising on a scale which was simply not previously possible.
Specific areas to be covered in this module include:

- Planning and Best Practices / Do's and Don'ts
- The Ethics of Grantmaking and Fundraising
- Digital Fundraising Ideas and Sources
- Traditional Fundraising Opportunities
- Fundraising Regulations and Laws
- The Ethics of Fundraising and Grantmaking

Participants will be informed ofacademic theory as well as practical, real life experiences, including timely examples and detailed analyses. The module allows participants to develop a working knowledge of responsibility and accountability required for fundraising and grantmaking activities and the legal, regulatory, and ethical aspects involved.

Learning Outcomes

After completing this module, the participants will:

- develop a working grasp of grantmaking and fundraising best practices
- understand current digital grantmaking and fundraising ideas and best practices.
- create an awareness of grant and fundraising ethics, regulations and reporting responsibilities.
- understand a board member's fundraising responsibilities.
- Understand the basic steps and requirements for the conceptualization, design and execution of a successful grant or fundraising initiative.