

SYLLABUS
BUSN 489; MW 12:45-2:00PM
Strategic Philanthropy
(3 Credit Hours)
Spring 2016

INSTRUCTOR: Kyle Gammenthaler
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OFFICE HOURS: Due to my advising schedule my office hours are by appointment only.

COURSE DESCRIPTION: From the Ancient Greeks to Andrew Carnegie to Bill Gates, philanthropic leaders have taken on communities' social problems for many generations. Not until lately has this idea of philanthropy been formalized into a strategic approach to change the world. Foundations, both community based or corporate, serve as a model for making effective philanthropic decisions. The tenets and principles found in these organizational structures easily translate into the individual giver's decision making processes as well. Contrary to popular belief, philanthropy does not simply pertain to individuals and organizations with millions and billions of dollars. We each have time, talent, and treasure that can be used wisely in an effort to better our society. At the very core, effective use of these resources makes you and me a philanthropic leader.

Through the course of this semester each student will not only learn about strategic giving, but practice it. The Philanthropy Lab has generously provided \$50,000 to our class so that we can distribute it to local nonprofit organizations. We will join classrooms across the country at Yale, Princeton, University of Texas, and Stanford as we engage in this innovative approach to giving. Students, operating as a foundation's board of directors, will determine the mission and objective of the funding based on students' values; the organization(s) to which funding will be allocated; the number of and size of the gift(s) that will be made; how the gift(s) will be awarded; and how the impact of the gift(s) will be evaluated and assessed.

To best accomplish this task, we will hear from multiple philanthropic leaders, engage in vibrant classroom discussions, and experience a unique process that is the first of its kind at Texas A&M. While much of the semester will operate in team settings, a primary goal for you as an individual, is to learn about how you can best respond to community needs as a philanthropic leader. Whether you have \$1, \$1,000,000, or 5 hours to volunteer on a Saturday afternoon, you will examine and further develop your own personal philanthropic autobiography. It is my hope that you leave this class with a comprehensive understanding of the intricacies of philanthropy and the nonprofit sector and a personal plan to engage this sector in the future.

LEARNING OUTCOMES:

This course allows the student to blend academic knowledge with practical experience by learning from required assignments, personal reflection and invited guest speakers. By the end of the course, the student can expect to:

1. Develop a personal philanthropic ethic that takes serious account of how one's time, talent, and treasure might benefit the public good.
2. Understand the nature of philanthropy and how it operates in a community setting.
3. Participate in the philanthropic process: establishing goals, performing due diligence, writing and vetting proposals, engaging in discussions that will persuade, debating merits, and reaching a collective decision.

4. Make funding decisions and learn about giving money away in an effective and strategic manner.
5. Enhance written and oral communication in the form of grantwriting and presentations.

REQUIRED TEXTS: *Strategic Giving: The Art and Science of Philanthropy* by Peter Frumkin
Money Well Spent by Paul Brest and Hall Harvey
Insider's Guide to Grantmaking by Joel Orosz
Various readings as assigned throughout semester.

PREREQUISITES: Admission into this course is contingent upon a successful application and review.

EXPECTATIONS:

- I. Expectations of the instructor
 - a. Organized class lessons that incorporate a variety of learning strategies.
 - b. Assignments and experiences designed to crystalize concepts/topics covered in class.
 - c. Availability inside and outside of the classroom.
 - d. Respect at all times.
- II. Expectations of the student
 - a. Be present mentally during the class period.
 - b. Assume the responsibility for your learning.
 - c. Timely completion of assignments and readings.
 - d. Willingness to share opinions with the class as a whole.
 - e. Consideration for other's opinions and beliefs.
 - f. Respect at all times.

ASSIGNMENTS:

- I. **Participation (Individual and Group) (10%):** Discussion is an integral component to your success in this course. All of your classmates, and myself, have much to learn from your thoughts and experiences. Occasionally, we will have guest speakers from outside of Mays Business School attend our class. You are expected and encouraged to engage the speaker in dialogue and ask questions. As always, please respect the opinions of any member of our classroom community.
- II. **Process Journal (20%):** You are expected to keep a journal of your thoughts and experiences throughout the entire class. I want you to see how your mindset and approach to philanthropy changes as the semester progresses. Your entry could be in response to a reading from class, a change in mindset, a response to a difficult situation, or anything else that gives a glimpse into your experience. You are required to submit 10 total entries that span the entire semester. There is no specific length for each entry, but brevity and concise writing is appreciated. The 10th entry should be a final reflection that can be as long as you deem necessary. **During the semester, I will ask for journal entries that we could use as blog posts to share our experience with the Mays Business School and Texas A&M community. Due May 2nd with periodic checks throughout the semester.**
- III. **Personal Autobiography (10%):** Based on our class discussions, readings, and out of class experiences, please write a 500 word statement on how you plan to best use your time, talent and treasure. What are your philanthropic goals and how do you plan to enact them in your daily life? What drives and motivates you to be a philanthropist? **Due March 30th**

- IV. **Group Grantmaking Process (50%):** The group assignments make up the bulk of the coursework and will be explained in greater detail on eCampus and in class. However, there are 3 main components to this process.
- a. **Identification (15%):** First, groups will form around particular interest groups related to various social issues. Your group will conduct initial research on 6 local nonprofits in your issue group. You are not required to have communication with the nonprofit but you will need to review online or print material that is relevant to the organization. Any communication would be in the context of “what the organization does” as opposed to what they would do with money. 1-2 page briefs are required for each of the nonprofits. *Due Feb 8th*
 - b. **Due Diligence and Grantwriting (15%):** Secondly, students will conduct their due diligence on 2 of the final 10 nonprofits. Through extensive research, interviews with CEO and/or key staff at the nonprofit, and site visits, the group will then write a grant proposal for their selected organizations. The nonprofit’s needs and desires will guide the writing of these proposals. Therefore, it is important to have clear dialogue with the nonprofit. More details and guidelines on this written document will be explained further in class. *Due April 4th.*
 - c. **Presentations (20%):** The third and final component of each group’s grantmaking process is to present both of the nonprofit organization proposals to their fellow board members/peers. These presentations are meant to convince your peers that this option deserves funding. Your group is expected to provide clear outcomes on what the money would achieve and any alternative funding options. Each group will give 2 separate presentations over the span of two weeks and will have time to engage in Q/A after each presentation. *April 4th, 6th, 11th, 13th*
- V. **Final Debate (10%):** The course culminates in the students acting as a board of directors to debate and discuss how the funding should be distributed. This is a crucial component to the class and should be approached with the utmost responsibility by each student. As a class, you will come to a collective decision on where the money is distributed. Some of the presented organizations will receive funding, some may not, and others may receive a different amount than asked for. This is all perfectly acceptable as this is how decisions are made on a foundation level. As a class, you will narrow down your list of nonprofits and associated dollar amount(s) over the span of 2 class periods. Once the decision is made, notification will be sent to the awarded recipients and to those not awarded funding. The only rules are that at least 2 nonprofits should be chosen as recipients and every organization is not required to receive funding. These are tough decisions, but the material and classes leading up will prepare you for this experience. **IMPORTANT NOTE: Due to the critical nature of these last two class periods, missing one would result in your grade being lowered one full letter grade.** *Due April 18th and April 20th.*

GRADING POLICY:

Participation	100 points	A: 895 points or higher
Process Journal	200 points	B: 795-894 points
Philanthropic Statement	100 points	C: 695-794 points
Grantmaking Process	500 points	D: 595-694 points
Final Debate	100 points	F: Below 595 points.

1000 total points

eCampus

I use eCampus to post much of the relevant information for this course, including the important dates, reading assignments, and instructions for the paper assignments. Students are expected to submit their assignments and papers via the designated assignment drop boxes on eCampus.

LATE WORK POLICY

All assignments must be completed before the beginning of the class on which the assignment is due. Given the fact that there is a lot of group work, each member should be informed and equipped to answer any questions related to the assignments.

Given the structured nature of the class, late work is unacceptable and unproductive. However, I do understand that working with local organizations brings some unique challenges in accomplishing certain tasks. If you or your group are having any issues completing an assignment on time, please let me know as early as possible so that we can figure out the best course of action.

ACADEMIC INTEGRITY STATEMENT:

Aggie Honor Code

“An Aggie does not lie, cheat, or steal or tolerate those who do.”

Upon accepting admission to Texas A&M University, a student immediately assumes a commitment to uphold the Honor Code, to accept responsibility for learning and to follow the philosophy and rules of the Honor System. Ignorance of the rules does not exclude any member of the Texas A&M University community from the requirements or the processes of the Honor System. For additional information please visit <http://aggiehonor.tamu.edu/>

ATTENDANCE POLICY:

Make-up Policy. If the absence is excused, the instructor must either provide the student an opportunity to make up any quiz, exam or other graded activities or provide a satisfactory alternative to be completed within 30 calendar days from the last day of the absence. To be excused the student must notify his or her instructor in writing (acknowledged e-mail message is acceptable) prior to the date of absence, and provide appropriate documentation for the absence. In cases where advance notification is not feasible (e.g., accident or emergency) the student must provide notification by the end of the second working day after the absence, including an explanation of why notice could not be sent prior to the class.

The reasons absences are considered excused by the university are listed below. See Student Rule 7 for details (<http://student-rules.tamu.edu/rule07.htm>). The fact that these are university-excused absences does not relieve the student of responsibility for prior notification and documentation. Failure to notify and/or document properly may result in an unexcused absence. Falsification of documentation is a violation of the Honor Code.

- 1) Participation in an activity that is required for a class and appears on the university authorized activity list.
- 2) Death or major illness in a student's immediate family.
- 3) Illness of a dependent family member.
- 4) Participation in legal proceedings or administrative procedures that require a student's presence.

- 5) Religious holy day. NOTE: Prior notification is NOT required.
- 6) Illness that is too severe or contagious for the student to attend class.
 - a) Injury or illness of three or more class days -- student will provide a medical confirmation note from his or her medical provider within one week of the last date of the absence (see Student Rules 7.1.6.1)
 - b) Injury or illness of less than three class days – student will provide following, within one week of the last date of the absence: (i.) Texas A&M University Explanatory Statement for Absence from Class form available at <http://attendance.tamu.edu> or (ii.) Confirmation of visit to a health care professional affirming date and time of visit
- 7) Required participation in military duties.
- 8) Other absences may be excused at the discretion of the instructor with prior notification and proper documentation.

Americans with Disabilities Act (ADA) Policy Statement

The Americans with Disabilities Act (ADA) is a federal antidiscrimination statute that provides comprehensive civil rights protection for persons with disabilities. Among other things, this legislation requires that all students with disabilities be guaranteed a learning environment that provides for reasonable accommodation of their disabilities. If you believe you have a disability requiring an accommodation, please contact the Department of Student Life, Services for Students with Disabilities in Cain Hall, Rm. B118, or call 845-1637.

MAYS FOOD & BEVERAGE POLICY

We have beautiful and state-of-the-art classrooms in the Wehner Building and Cox Hall. We want to maintain the high quality of these classrooms for the students in future years. Thus, it is necessary for you to adhere to the established policy of no beverages, food, tobacco products, or animals (unless approved) within the classrooms. Bottled water is permitted. Your assistance is greatly appreciated.

Detailed Class Schedule and Reading List

Week 1: Introduction to Course

- **January 19th** – No Class – MLK Day
- **January 21st** – Class Introductions and Overview of Semester
 - A Primer on Nonprofit Organizations (eCampus)

Week 2: Philanthropic Context

- **January 25th** – What is Philanthropy?
 - Peter Singer, *What Should a Billionaire Give – And What Should You?* (<http://www.nytimes.com/2006/12/17/magazine/17charity.t.html?pagewanted=all&r=1&>)
 - Understanding Philanthropy pp. 1-61 (eCampus)
- **January 27th** – Historical and Current Philanthropic Landscape
 - Andrew Carnegie, *Gospel of Wealth* (eCampus)
 - Viewpoint of a Practical Man (eCampus)
 - Philanthropy Hall of Fame Bios (Choose 3 from 19th and 20th century)
 - Bill Gates Commencement Speech (<http://news.harvard.edu/gazette/story/2007/06/remarks-of-bill-gates-harvard-commencement-2007/>) or (<https://www.youtube.com/watch?v=zPx5N6Lh3sw>)
 - Carolin Preston, *Steve Jobs Found Much to Dislike About Philanthropy* (eCampus)

Week 3: Philanthropic Leadership

- **February 1st** – Why Give?
 - What Makes People Give? (<http://www.nytimes.com/2008/03/09/magazine/09Psychology-t.html?pagewanted=all>)
 - Understanding Philanthropy pp. 62-95 (eCampus)
 - Chapter 8 *Giving Styles*, Strategic Giving
- **February 3rd** – Guest Speaker – TBD

Week 4: Strategic Philanthropy

- **February 8th** – Strategic Philanthropy
 - Chapter 4 *Idea of Strategic Giving*, Strategic Giving
 - Chapter 1 *The Promise of Strategic Philanthropy*, Money Well Spent
 - Oliver Zunz, *Christmas Seals and Mass Philanthropy* (<http://www.nytimes.com/2011/12/23/opinion/christmas-seals-and-mass-philanthropy.html>)
- **February 10th** – Understanding the Challenges
 - SSIR, Failure of Philanthropy (eCampus)
 - Chapter 2 *Central Problems in Philanthropy: Effectiveness, Accountability, and Legitimacy*, Strategic Giving

Week 5: Foundation Operations

- **February 15th** – Role of the Foundation in American Society
 - Insider's Guide to Grantmaking, pp. 1-37

- **February 17th** – Guest Speaker – Patricia Gerling, President of Community Foundation of Brazos Valley

Week 6: Grantmaking Process

- **February 22nd** – Relationship Dynamics
 - Insider's Guide to Grantmaking, pp. 38-65
- **February 24th** – Evaluating Proposals
 - Insider's Guide to Grantmaking, pp. 66-82

Week 7: Grantmaking Process

- **February 29th** – Board Meeting to discuss letters of inquiry
 - No Readings
- **March 2nd** – Due Diligence
 - Insider's Guide to Grantmaking, pp. 130-142
 - Chapter 5 *Grantor – Grantee Relationship*, Money Well Spent
 - La Piana Consulting, *Due Diligence Done Well: A Guide for Grantmakers (eCampus)*

Week 8: Grant Making Process

- **March 7th** – Guest Speaker – Sam Torn, Founder of Camp Ozark
- **March 9th** – Interview/Site Visit Etiquette
 - Bridgespan Article, CEO Interview
 - Bridgespan Article, Conducting Site Visit

Week 9: SPRING BREAK

Week 10: Personal Philanthropy

- **March 21st** – Guest Speaker - TBD
- **March 23rd** – Personal Philanthropic Autobiography

Week 11: Site Visits

- **March 28th** - NO CLASS (use for site visits / I will be available in class for questions)
- **March 30th** - NO CLASS (use for site visits / I will be available in class for questions)

Week 12: Board Presentations

- **April 4th** – Board Presentations (3 Groups)
- **April 6th** – Board Presentations (3 Groups)

Week 13: Board Presentations

- **April 11th** – Board Presentations (4 Groups)
- **April 13th** – Discussion/Debate Prep
 - Compassionate Listening Article

Week 14: Final Funding Decisions

- **April 18th** – Final Funding Decisions
- **April 20th** – Final Funding Decisions

Week 15: Future Evaluation of Funding

- **April 25th** – Measuring Success
 - Chapter 10 *Measuring, Knowing, and Acting*, Strategic Giving
- **April 27th** - Methods of Future Evaluation

Week 16: Course Reflection and Check Presentation

- **May 2nd** – Course Reflection
- **May 2nd** – Check Presentation from 6-8pm (more details to come!)
- **May 4th** – NO CLASS