

OAM 421/621

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# Philanthropy Lab

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## Course Description & Objectives

According to The Atlanta Journal-Constitution, Atlanta had the highest level of income disparity among U.S. cities with over 100,000 inhabitants.<sup>1</sup> This experiential learning course will introduce students to the role of philanthropy, both individual and corporate, play in solving public problems, particularly with regard to income inequality in Atlanta. Topics covered in the course will include the history and theory of philanthropic giving in the U.S. as well as leading strategic and equitable philanthropic management approaches. We believe that Philanthropy is best learned by doing. During the course, students will form their own “mini-foundations” that will be challenged to identify and make grants totaling \$50-\$85K to Atlanta nonprofits, incubated by the [Center for Civic Innovation](#), that are addressing inequity in innovative ways.

In this capacity, students will learn how to:

- Tackle issues of inequality both in the workplace (as stakeholder within organizations) and in the community (as civically engaged participants)
- Research, evaluate, and select nonprofits for investment
- Establish effective partnerships and support community-driven change through skill-based volunteerism and advocacy
- Approach problem solving through lens which leverages innovative possibilities informed by past experiences including failed efforts

## About Philanthropy Lab

The course is taught in partnership with the Philanthropy Lab. Based in Fort Worth, Texas, the Philanthropy Lab aims to expand student interest and participation in philanthropy. Since 2011, the Lab and its partners have invested more than \$13 million in 32 partner schools to facilitate experiential courses on philanthropy for 4,252 students. In addition to the donations, students are also invited to develop and post their own giving pledges to be posted on The Philanthropy Lab’s website and evaluate their grants two years later. Alumni representatives of each class are invited to participate in an annual [Ambassadors Conference](#). Learn more at [thephilanthropylab.org/](http://thephilanthropylab.org/). Since 2020, Emory’s Philanthropy Lab course has made more than 30 grants to local nonprofits totaling \$215,000.

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<sup>1</sup> Jackson, Dylan. 2022. "Atlanta has the highest income inequality in the nation, Census data shows." *AJC*, November 28. See also Berube, Alan. 2018. "City and metropolitan income inequality data reveals ups and downs through 2016." Brookings Institution.

## Instructors

### **Brian Goebel, Managing Director, Goizueta's Business & Society Institute**

Brian leads the Goizueta Business & Society Institute's collection of innovative programs and student activities that boost neighborhood vitality in Atlanta through microbusiness development, strengthen coffee grower communities in Latin America through women's empowerment, and develop the next generation of principled social enterprise leaders through experiential learning. He has extensive experience in the nonprofit sector including addressing homelessness at United Way of Greater Atlanta and co-founding a volunteer-led 501(c)3 organization to aid citizens impacted by disaster. Brian currently serves on the board of the Georgia Social Impact Collaborative (GSIC) and also serves on the Founder's Advisory Council for social enterprise nonprofit First Step Staffing.

He has a Master of Business Administration (MBA) from Emory's Goizueta Business School and a Bachelors of Arts (BA) degree in sociology from the University of Michigan. Brian worked in the private sector as a management consultant with Deloitte Consulting LLP before returning to Emory in 2015 to lead the Social Enterprise Center (now Goizueta's Business & Society Institute). While at Deloitte, Brian worked on a number of pro bono social impact projects in addition to serving Fortune 500 and Federal government clients.

### **Tené Traylor, Vice President for Nonprofits and Philanthropy & Senior Fellow, Urban Institute**

Tené leads Urban Institute's Center on Nonprofits and Philanthropy, which works across all sectors to increase the impact of actors on the front lines of social change. She is a national expert in place-based philanthropy, equity, and civic leadership, particularly in the South, where she has honed a distinguished career in the nonprofit and philanthropic sector.

Prior to joining Urban Institute, Tene served as Fund Advisor for The Kendeda Fund focusing on equitable access to high-quality K12 education and economic opportunity (emphasis on long-term affordability, community wealth building, and accessible quality transit) for historically marginalized populations and Black and brown people in metro Atlanta. She also managed the fund's national portfolio dedicated to restoring and reclaiming dignity to work for people living with a current or old criminal conviction. Her career in the nonprofit and philanthropic sector spans 20 years. Before Kendeda, Tené worked at The Community Foundation for Greater Atlanta, United Way, and The Zeist Foundation. She has experience in community development, neighborhood transformation, HIV/AIDS, interfaith relations, affordable housing, education justice/reform, criminal justice, and economic justice/community wealth building.

Tené has a Master of Public Administration (MPA) with a concentration in public policy and nonprofit administration from the University of Georgia and a Bachelor of Arts degree in political science from Georgia State University. She is on the board of Atlanta Housing Authority, The Center for Community Progress, Georgia Grantmakers Association, and the co-founder and past board chair for the Atlanta Wealth Building Initiative.

## Course Materials

We will consume a mix of academic articles, book chapters, podcasts, videos and popular press pieces to develop a well-rounded but critical understanding of the intersection of philanthropy and inequity. *All readings, videos, and podcasts must be completed prior to coming to class.* All readings are available online via links in the syllabus or Course Reserves. You will be responsible for everything in the readings or videos / podcasts, even if we don't discuss everything in class. Additionally, we will learn from professionals in the field who will be joining us throughout the semester as guest lecturers and / or panelists.

## Course Grant Funding Pool

In support of experiential learning, Emory University donors and the National Philanthropy Lab will contribute funds as follows to the 2023 course. .

- **Guaranteed Funds (\$54,500):** Emory annual investment contribution from generous donors (\$50,000) and Class of 2020 evaluation participation bonus (\$4,500).
- **Incentive and Bonus Funds (Up to \$35,000):** Student Giving Goal Incentive (\$1,000 per enrolled undergraduate student, max of \$25,000); Philanthropy Lab Emory President Visit Bonus (\$500 per enrolled undergraduate student, max of \$10,000).

Note that incentive and bonus funding is contingent upon the actions of Spring 2023 enrolled students and participation of Emory University President Greg Fenves in class giving ceremony at the end of the semester.

Per funding requirements, each student will be asked to complete two surveys (one at beginning of class and one at end of class) from National Philanthropy Lab. If at least 80% of enrolled students participate in both surveys, Emory will receive \$10,000 in additional funding for next year's (2024) course!

Additionally, students will be required to review, initial and return course participant agreement at the beginning of course which will be handed out and collected during the first week of class—Emory is required to have at least 80% of enrolled students complete (our goal is 100%). More instructions will be provided on optional giving goal submissions and other incentives in class including instructions on how to access the new Philanthropy Lab student portal.

## Assignments

Assignments for this course include classroom participation, four short written assignments, and one team project. There are no exams in this class.

Type	Component	Points	%	Due Date
Individual	Participation	50	25%	-
Individual	\$10 Challenge Discussion Post	5	5%	1/24/23
Individual	Personal Philanthropic Profile	15	7.5%	1/31/23
Individual	Position Papers (Pick 1 of 3 Options)	30	15%	Various
Individual	Letter to Future You	20	10%	4/20/23
Team	Charter	10	5%	2/07/23
Team	Giving Philosophy	20	10%	2/21/23
Team	Grant Making Rubric & Finalist Interview Guide	10	5%	3/16/23
Team	Grant Recommendations Report & Presentation	25	12.5%	4/04/23
Team	Final Funding Briefing Package (Mock Media Release & Funding Detail Doc)	15	7.5%	4/13/23
		<b>200</b>	<b>100%</b>	

## **Individual Components**

### **Participation (50 points or 25%)**

Learning is a social process, and thus it is important for your education and the education of your fellow classmates that you come to class ready to think and engage. *Attendance alone does not count as active participation.* Students will be expected to participate in each session in a thoughtful, productive, and engaging manner by raising thought-provoking questions, listening attentively, sharing your own examples and experiences, participating in polls if applicable, and generally making the classroom a vibrant, civil, and interesting place to be for 75 minutes.

- Class participation will also incorporate feedback from the team peer evaluation survey which will take place at the end of the semester.
- An additional survey midway through the semester will also be leveraged with no impact on grades to help each team and its members reflect on their engagement and contributions. This will allow for feedback to be implemented to optimize team performance for the remainder of the semester.

Some of us are more introverted than others; if this includes you, please do not hesitate to make an appointment with the instructors within the first few weeks of class to discuss other strategies for participation.

### **\$10 Challenge Canvas Discussion Post (5 Points or 5%) – Due 1/24/23**

We will distribute \$10 to everyone enrolled in class. You will be asked to use the \$10 to make whatever impact you wish. Reflecting on your \$10 experience, you will be asked to write up how you used the money and why via Canvas discussion post prior to class on the due date.

### **Personal Philanthropic Profile (15 Points or 7.5%) – Due 1/31/23**

Reflecting on your \$10 experience along with your own interests and values, you will be asked to write your own philanthropic profile. What causes do you currently support and why? Which philanthropist do you most look to model and why? What philanthropic goals, such as volunteering, advocating, donating, or serving on a board, have you set for yourself in both short and long term? What proposed DRAFT Giving Goal do you have for yourself to post on the Philanthropy Lab website? Your 1,000 word reflection and profile should be uploaded to Canvas before class on the due date.

### **Position Paper (30 points or 15%) Due Dates Vary See Below**

You will be asked to write ONE short position paper over the course of the semester. The purpose of the paper is for you to reflect on the course material (article, podcast, or film/video) and take a stand on a current philanthropic debate. Each 1,500 word paper should be uploaded to Canvas before class on the due date.

More details on each paper including response prompt will be provided at least two weeks prior to their due date. You may choose from the following options:

- Position paper 1 – Due 2/02/23 (Inequity in Atlanta)
- Position paper 2 – Due 3/14/23 (Effective Place-Based Collaboration)
- Position paper 3 - Due 4/11/23 (Montgomery/Equal Justice Initiative)

### **Letter to Future You (20 points or 10%) – Due 4/20/23**

At the end of the course, we would like each student to reflect on what they learned and write themselves a letter to remind their future self in the year 2033 (10 years from now) of key lessons they learned along with any key commitments / goals that they have for their future self. Your letter should contain 1,000 words and should identify a specific philanthropist that you would like to emulate and at least three specific advice statements for your future self along with at least three giving goals that you want to remind yourself to remain committed. More details will be given later in the semester. Your 1,000 word letter should be uploaded to Canvas before class on the due date.

### **Team Components**

The philanthropic investments in the class will be made through teams which will act as its own mini -foundation and will have allocated pool of funds available (final amount to be confirmed based on final student enrollment count at drop / add) to invest in registered 501(c)3 organizations from the Center for Civic Innovation network.

Any additional bonus money earned from Philanthropy Lab incentives will be allocated through a class discussion near the end of the semester. Teams will be assigned based on student type (undergraduate or graduate) and impact interest area preferences which will be collective through short survey

Each mini-foundation team will be assigned one of the course instructors as a grant making coach. Roles on each team include:

- **Finalist Interview Process Rep (1 Student)** – Responsible for serving as contact for outreach and coordinating logistics associated with interviews of finalist grantees. Interviews will be conducted in person outside of class March 21-25. In community conference room sites for interviews will be provided for student teams at the **Russell Center for Innovation and Entrepreneurship (RICE) and Pittsburgh Yards**. More information to be provided.
- **Investment Committee Rep (1 Student)** – Each team will nominate one member to serve on the community investment committee, which will finalize each community’s grant recipients and amounts along with representing their team at class bonus fund discussion at end of semester.
- **Evaluation Rep (2 Students)** – Reps will serve as evaluation leaders for their team which includes committing to following up on grants with organizations over the next 2 years.

### **Team Charter (10 points or 5%) – Due 2/07/23**

Leveraging the template provided on Canvas, each student team will complete a team charter that documents the strengths and skills of each team member (assets) along with rules and structure that will govern and inform the way you work, how you communicate, resolve differences, and make decisions. Please leverage template on Canvas.

### **Team Giving Philosophy (20 points or 10%) – 2/21/23**

Matching the practices of successful foundations, each student team will prepare and present to the class a statement document that outlines their mission, values, priority focus areas, broad theory of change, along with any other qualification priorities related to potential grantees. Please leverage template on Canvas.

### **Grant Making Rubric & Finalist Interview Guide (10 points or 5%) – 3/16/23**

In advance of finalist interviews, each team will submit scoring rubric along with an interview guide which will serve as critical tools in assessing organizations that you meet with and determining funding decisions. Sample rubric and interview guide leading practices will be shared on Canvas.

### **Grant Recommendations Report & Presentation (25 points or 12.5%) – 4/04/23**

Working closely with your assigned course instructor who will serve as your mini-foundation’s coach, you will plan, execute, and summarize key learnings from your grant identification process. Each team will complete a summary and present to class. Summaries will include more details on your team’s giving philosophy, priority impact focus area, top 5 organizations considered along with final funding recommendations (who, why, and how much). Please leverage template on Canvas. Each team will be assessed on quality of content in slides along with presentation delivery.

### **Funding Briefing Package (Mock Media Release & Funding Detail Doc) (15 points or 7.5%) – Due 4/13/23**

Building on all of the previous team assignments completed earlier in the semester, each team will assemble two items:

- A mock media release (750 words) or short video (up to 4 minutes) summarizing their foundation’s name, mission, giving philosophy, grantees funded along with amounts, along with specific outcomes

that they hope their funding can bring about. decision rationale / rating, recommended funding amounts, and, if applicable, funding restrictions.

- Set of Funding Detail Documents that provide key information on each grantee your team has selected to fund which are required to be reported to the National Philanthropy Lab office along with Emory Goizueta Business School for payment processing. Please leverage template on Canvas.

### Montgomery Experiential Learning Module

An optional session for this Spring’s course will be an experiential learning module consisting of a day trip to Montgomery, Alabama to learn more about and experience first-hand the work of the Equal Justice Initiative (EJI). EJI is a private, 501(c)(3) nonprofit organization, founded by Bryan Stevenson (author of acclaimed book *Just Mercy*) that provides legal representation to people who have been illegally convicted, unfairly sentenced, or abused in state jails and prisons. On our visit, we will visit the *Legacy Museum: From Enslavement to Mass Incarceration* and/or the *National Memorial for Peace and Justice*.

The date for the trip will be March 31 or April 1. More details to be provided once travel module details are confirmed. All students enrolled in the course will be provided transportation, meals, and admission to all experiences – no out of pocket costs for students are anticipated. Learn more about EJI at <https://eji.org/about/>.

### Evaluation

Grades for this course are based on the scheme outlined above. The grades for this class will have an *anticipated* distribution according to the suggested guidelines of the BBA or MBA program office. Contact the instructors if you have concerns about your grade as the semester progresses. *However, under no circumstance will grades be discussed after the final class.*

BBA Grading Scale	
Grade	Points
A	186-200
A-	180-185
B+	174-179
B	165-173
B-	160-164
C+ or below	159 and below

MBA Grading Scale	
Grade	Descriptive Definition
DS	An honors grade recognizing work of exceptional quality.
HP	Work of a very good quality as evidenced by a solid mastery of all course concepts.
PS	Work of good quality as evidenced by a solid mastery of most course concepts and techniques.
LP	Work of below standard or marginally acceptable quality.
NC	Work of unacceptable quality.
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### Academic Dishonesty

Academic dishonesty will not be tolerated under any circumstance. This includes unintentional plagiarism of previously published material. All students are expected to follow the Goizueta Business School Honor Code.

## Access, Disability Services, and Resources

Students may request additional time on quizzes and other accommodations by contacting the Office of Accessibility Services. Please notify the instructor during the first week of class if you would like such accommodations. Learn more at <https://accessibility.emory.edu/students/>.

## Additional Course Policies

1. Follow all of Emory University's COVID19 guidelines to ensure a safe learning environment. See guidelines at <https://www.emory.edu/forward/>.
  - If any class sessions are required to pivot to virtual due to COVID19 concerns, students should join with video enabled (if bandwidth allows) and limit distractions to ensure focus.
2. Complete and return required items from the National Philanthropy Lab office in a timely fashion to ensure Emory's class is in line with grant partnership standards.
3. Show up to class on time and be ready to engage.
4. Express your ideas and respect the ideas of others.
5. For in person sessions with guest speakers, please focus on special insights being shared and limit distractions (phone, laptop, etc.).
6. Discuss all absences via e-mail with the professors beforehand at least 24 hours in advance. However, this does not guarantee the absence will be excused. Absences for "super days" and interviews are not considered excused.
7. Late assignments will be accepted on a case by case basis. Please reach out proactively to instructors in advance of the deadline regarding extension requests.
8. Discuss grade concerns as they arise and *not* at the end of the semester. Specific concerns about assignments must be submitted in writing within 48 hours of receiving the grade.
9. Anyone who has difficulty securing course materials, housing, or food and believes this may affect their course performance is urged to contact Campus Life and, if comfortable, the instructors to navigate potential resources available. Learn more at <http://success.emory.edu/>.

## Course Schedule, Topics, Prep Items, and Homework Overview

The first half of the semester focuses on the role of philanthropic organizations in addressing public problems, your team’s giving philosophy and theory of change, and the history and current state of inequity within Atlanta area communities. The second half of the semester dives deep into how philanthropic investments get made, including how to select and evaluate organizations. The semester also has plenty of “flex time” for teams to work on their mini-foundation’s gifts and related grant making documentation. *Note: Items below are DRAFT and subject to change.*

#	Date		Session	Topics	Items to Read / Steam	Individual HW	Team HW
1	TU	1/10	<b>Our Journey:</b> Introductions and Course Overview  TT/BG	Introduction to instructors and class peers; Syllabus / learning journey overview; why this course focuses on Inequity in Atlanta; Why philanthropy Matters; Commitments to each other; Key requirements and expectations from National Philanthropy Lab	<ul style="list-style-type: none"> <li>Course Syllabus</li> <li>Philanthropy Lab National Foundation Agreement Letter</li> <li>Connecticut Council for Philanthropy, 2015. <a href="#">“Ambassador James A. Joseph: Sharpen The Saw.”</a></li> </ul>		
2	TH	1/12	<b>Philanthropy's Fundamentals:</b> Origins, Purpose, Successes, and Failures  TT/BG	Meaning / Definition; Historic Roots and Evolution in U.S.; Current U.S. Giving Landscape; Successes and failures of philanthropy I	<ul style="list-style-type: none"> <li>Lynn, Elizabeth and Susan Wisely, 2006. <a href="#">“Four Traditions of Philanthropy.”</a> Center for Civic Reflection.</li> <li>Urban Institute. 2021. <a href="#">“Factsheet: Findings on US Donation Trends, 2015–2020: Nonprofit Trends and Impacts 2021.”</a></li> <li>Buchanan, Paul. 2019. <i>Giving Done Right</i>. Chapter 2. Access via course reserves.</li> </ul>	Sign/Initial and Return National Lab Agreement Letter (to be handed out in class)	
3	TU	1/17	<b>Philanthropy's Future I:</b> Challenges, Opportunities, and Innovations  TT/BG	Criticisms of philanthropy; “Old Gospel” vs. “New Gospel of Wealth”; What 2020 Taught Us; Innovations Driving philanthropy of Tomorrow	<ul style="list-style-type: none"> <li>Carnegie, Andrew. 1889. <a href="#">“The Gospel of Wealth.”</a> Carnegie Corporation of New York. June.</li> <li>Walker, Darren. 2015. <a href="#">“Why Giving Back Isn’t Enough.”</a> The New York Times, December 17.</li> <li>From Idea to Impact Arabella Podcast, 2022. <a href="#">“Benjamin Soskis and Philanthropic History.”</a></li> </ul>	Pre-Course Surveys:  1. National Lab Course (Via Portal) 2. Emory via Qualtrics	

#	Date		Session	Topics	Items to Read / Steam	Individual HW	Team HW
4	TH	1/19	<b>Philanthropy's Future II:</b> Challenges, Opportunities, and Innovations  TT/BG	Continuing discussions on philanthropic future with focus on top trends	<ul style="list-style-type: none"> <li>● <a href="#">Trends in Philanthropy for 2023</a>. Dorothy A. Johnson Center (Grand Valley State University)</li> </ul>		
5	TU	1/24	<b>Defining Your Philanthropic Identity I:</b> Personal values, goals, and commitments  BG	Discuss role of personal interests, bias, and values in philanthropy; Strengths and challenges that personal interests bring about; Giving goals / commitments that are common among high income individuals; Debrief \$10 challenge	<ul style="list-style-type: none"> <li>● The Bridgespan Group. <a href="#">"Clarifying Your Aspirations."</a></li> <li>● Freeman, Tyrone McKinley. 2020. <i>Madam C.J. Walker's Gospel of Giving</i>. Introduction. Access via course reserves.</li> <li>● <a href="#">YouTube Video</a>: Madam C.J. Walker's Gospel of Giving Black Women's Philanthropy</li> <li>● Herzog, Patricia Snell. 2019. <a href="#">"Why You Should Give Your Money Away Today."</a> The New York Times. December 3.</li> </ul>	\$10 Challenge Discussion Post	
<b>1/24: DROP/ADD DEADLINE FOR UNDERGRAD BUSINESS STUDENTS</b>							
6	TH	1/26	<b>Defining Your Philanthropic Identity II:</b> Personal values, goals, and commitments  BG	Continuing Philanthropic Identity discussion with in class activity and / or guest speaker(s)	<ul style="list-style-type: none"> <li>● Scott, MacKenzie. 2021. <a href="#">"No Dollar Signs This Time."</a> Medium. December 8.</li> <li>● Hayes, Bill. 2022. <a href="#">"Special Interview with Patagonia Chair Charles Conn."</a> Directors &amp; Boards. September.</li> <li>● Tedesco, Michael Moody. 2022. <a href="#">"The Future of Family Philanthropy."</a> Stanford Social Innovation Review. September 12.</li> </ul>		
7	TU	1/31	<b>Inequity in the ATL I:</b> Tale of two Atlanta's  BG	What is inequity and why does it matter; What does inequity look like in Atlanta; What are the drivers of inequity; What are ways to eliminate inequity; How is Philanthropy historically been engaged in this issue	<ul style="list-style-type: none"> <li>● Pendergrast, Mark. 2017. <i>City of the Verge</i>. Chapter 4. Access via course reserves.</li> <li>● Annie E. Casey Foundation. 2019. <a href="#">"Changing the Odds: Promise and Progress in Atlanta."</a></li> </ul>	Philanthropic Profile Write-Up	

#	Date		Session	Topics	Items to Read / Steam	Individual HW	Team HW
8	TH	2/2	<b>Inequity in the ATL II:</b> Tale of two Atlanta's  BG	Continuing Part I. What is inequity and why does it matter; What does inequity look like in Atlanta; What are the drivers of inequity; What are ways to eliminate inequity; How is Philanthropy historically been engaged in this issue	<ul style="list-style-type: none"> <li>Smith, Nathaniel. 2020. <a href="#">“Atlanta Must Lead the Way in Advancing Racial Equity.”</a> Atlanta Magazine. June 5.</li> <li>Stanford Center on Poverty and Inequality. 2011. <a href="#">“20 Facts About U.S. Inequality Everyone Should Know.”</a></li> <li>Review <a href="#">Metro Equity Atlas</a> Website</li> </ul>	Position Paper #1: Inequity in Atlanta	
9	TU	2/7	<b>Role of Philanthropy in Addressing Inequity I:</b> From “Atlanta Way” to Brighter Day (TT/BG)	The sector's historic approach to tackling inequity (“Atlanta Way”); What has worked, what has not; Promising new principles and approaches	<ul style="list-style-type: none"> <li>Dorsey, Cheryl, Peter Kim, Cora Daniel, Lyell Sakaue, and Britt Savage. 2020. <a href="#">“Overcoming the Racial Bias in Philanthropic Funding.”</a> Stanford Social Innovation Review. May 4.</li> <li>National Committee for Responsive Philanthropy. 2018. <a href="#">“As the South Grows: Bearing Fruit.”</a></li> </ul>		Team Charter
10	TH	2/9	<b>Role of Philanthropy in Addressing Inequity II:</b> From “Atlanta Way” to Brighter Day  TT/BG	Continuing Part 1 with a deeper dive into the importance of systems thinking	<ul style="list-style-type: none"> <li>The Racial Equity Institute. <a href="#">“The Groundwater Approach: Building a Practical Understanding of Structural Racism.”</a></li> <li>Powell, John. 2015. <a href="#">“Implicit Bias and Its Role in Philanthropy and Grantmaking”</a> National Committee for Responsive Philanthropy. Spring 2015.</li> <li>The Kendeda Fund. 2020. <a href="#">“Centering Racial Equity: In Conversation with Dena Kimball and Tené Traylor Racial Equity.”</a> July 23</li> </ul>		
11	TU	2/14	<b>Team Giving Philosophy:</b> Grant Making Strategy Essentials  BG	Setting strategy in advance to guide grant making; Key questions to explore and answer; Targets and goals to consider; Equity and other lenses to build in from start	<ul style="list-style-type: none"> <li>Southeastern Council of Foundations. 2017. <a href="#">“Philanthropy as the South’s Passing Gear: Fulfilling the Promise.”</a> Chapter 2.</li> <li>Grantcraft. 2007. <a href="#">“Grant Making with a Racial Equity Lens.”</a></li> <li>National Committee for Responsive Philanthropy, 2020. <a href="#">“Black Funding Denied: Community Foundation Support for Black Communities”</a></li> </ul>		

#	Date		Session	Topics	Items to Read / Steam	Individual HW	Team HW
12	TH	2/16	<b>Team Giving Philosophy Workshop:</b> Building Your Team's Strategy BG	Review Template and purpose; Outline key objectives and expectations for Philosophy document; Team workshop breakouts; Present philosophy from each team	<ul style="list-style-type: none"> <li>The Bridgespan Group. <a href="#">“How to Create Effective Philanthropy: Six Questions to Guide Donors.”</a></li> <li>Callahan, David. 2019. <a href="#">“Seven Mistakes That New Billionaire Philanthropists Make—and How MacKenzie Bezos Can Avoid Them.”</a> Inside Philanthropy. May 29.</li> </ul>	Submit Giving Goal to Philanthropy Lab Portal	
13	TU	2/21	<b>Researching and Identifying Grantee Organizations:</b> Approaches and Tools BG	Common practices used to source giving opportunities; Publicly available tools and resources to aid research; Art and science of process; Pitfalls to avoid including bias; Value of networks and partners to source opportunities	<ul style="list-style-type: none"> <li>The Bridgespan Group. <a href="#">“How to Research a Nonprofit—Light-Touch Approach.”</a></li> <li>Buchanan, Paul. 2019. <i>Giving Done Right</i>. Chapter 5. Access via course reserves.</li> <li>Chan, Nancy and Pamela Fischer. 2016. <a href="#">“Eliminating Implicit Bias in Grantmaking Practice.”</a> Stanford Social Innovation Review. December 1.</li> </ul>		Team Giving Philosophy
14	TH	2/23	<b>Leveraging Partnerships to Amplify Impact:</b> Meet Center for Civic Innovation (CCI) BG	What is CCI; How has CCI worked to develop new nonprofits with proximity to problems they are looking to solve; Why is CCI unique and why did we choose to partner with them; How is CCI and Civic Innovation Fellow Nonprofits tackling inequity in our city; In what ways can our grant funds make an impact	<ul style="list-style-type: none"> <li>TedX Peachtree (video), 2016. <a href="#">“Rohit Malhotra: Restoring Trust in Government.”</a></li> <li>Malhotra, Rohit. 2020. <a href="#">“America’s Most Unequal City Does Not Trust Black Women to Lead.”</a> Medium. September 7.</li> <li>Review <a href="#">CCI Fellows Program information</a>.</li> </ul>		Begin grant application Review
15	TU	2/28	<b>Evaluating Grant Investment Opportunities:</b> Defining Decision Making Criteria TT/BG	Key decision making criteria to drive decisions; Understanding theory of change; What are good ways to fairly and equitably rate organizations you are considering; How should you right size your criteria for stage and scale of organizations you wish to support (not one size fits all); Restricted and unrestricted funding pros / cons.	<ul style="list-style-type: none"> <li>The Bridgespan Group. <a href="#">“Nonprofit Due Diligence: Donor Decision Tool.”</a></li> <li>Starr, Kevin. 2011. <a href="#">“Just Give ’Em the Money: The Power and Pleasure of Unrestricted Funding.”</a> Stanford Social Innovation Review. August 3.</li> </ul>	Mid-Semester Team Peer Feedback Survey	

#	Date		Session	Topics	Items to Read / Steam	Individual HW	Team HW
16	TH	3/2	<b>Grant Application Review Working Session:</b> Teams in Action BG	Working session for teams to finalize and communicate finalist grantees for interview next steps.	-		
<b>3/7 &amp; 3/9: SPRING BREAK NO CLASS SESSIONS</b>							
17	TU	3/14	<b>Grantmaking in Action:</b> Interviewing and Decision Making Tactics BG	Tactical guidance, leading practices and other approaches to ensure successful, equitable grantmaking discussions / relationship building	<ul style="list-style-type: none"> <li>Wong, Nate, Andrea McGrath. 2020. <a href="#">“Building a Trust-Based Philanthropy to Shift Power Back to Communities.”</a> Stanford Social Innovation Review. November 20.</li> <li>Taylor, Jim. 2020. <a href="#">“The Value of Lived Experience.”</a> Boardsource Blog. August 4.</li> <li>The Bridgespan Group. <a href="#">“Eight Questions to Ask a Nonprofit Leader in Your Nonprofit Due Diligence.”</a></li> <li>Grantcraft. 2018. <a href="#">“Mapping Change: Using a Theory of Change to Guide Planning and Evaluation.”</a></li> </ul>	Position Paper #2 Effective Collaboration	
18	TH	3/16	<b>Team Working Session:</b> Finalist Interview Prep BG	Team time in class to work with instructors and one another on preparation for finalist interviews March 21-March 25.	-		Grant Making Rubric & Finalist Interview Guide
19	TU	3/21	<b>FINALIST INTERVIEWS</b>	No class session. Offsite finalist interviews	-		
20	TH	3/23	<b>FINALIST INTERVIEWS</b>	No class session. Offsite finalist interviews	-		
21	SA	3/25	<b>FINALIST INTERVIEWS</b>	No class session. Offsite finalist interviews	-		

#	Date		Session	Topics	Items to Read / Steam	Individual HW	Team HW
22	TU	3/28	<b>Team Final Funding Decision:</b> Working Session  TT/BG	Working Sessions for teams with instructor coaches to finalize and coordinate funding decisions and next steps	<ul style="list-style-type: none"> <li>Neimand, Annie. 2018. <a href="#">“How to Tell Stories About Complex Issues.”</a> Stanford Social Innovation Review.” May 7.</li> </ul>		Draft Team Funding Recommendations
23	TH	3/30	<b>Careers in Philanthropy:</b> Leaders Panel  TT/BG	What does a changemaking career look like? Learn more changemakers that have made an impact through various roles in diverse industries.	<ul style="list-style-type: none"> <li>Silverman, Les and Lynn Taliento. 2006. <a href="#">“What Business Execs Don’t Know – but Should – About Nonprofits.”</a> Stanford Social Innovation Review. Summer 2006.</li> <li>Smith, David, Jeanine Becker. 2018. <a href="#">“The Essential Skills of Cross Sector Leadership.”</a> Stanford Social Innovation Review. Winter 2018.</li> </ul>		
-	FR/SA	3/31 or 4/1	<b>Optional: Montgomery Experiential Learning Module</b>  TT/BG	Montgomery, Alabama	<ul style="list-style-type: none"> <li>Ted Talk (Video), 2012. <a href="#">Bryan Stevenson: We Need to Talk About An Injustice</a></li> <li>Chotiner, Isaac. 2020. <a href="#">“Bryan Stevenson on the Frustration Behind the George Floyd Protests.”</a> The New Yorker. June 1.</li> <li>Elliot, Debbie. 2022. <a href="#">“A civil rights memorial in Alabama expands to document lynching victims' stories.”</a> NPR. April 21.</li> </ul>	-	-
24	TU	4/4	<b>Team Grant Recs Presentations / Discussion:</b> Assigned Teams Present  BG	Team presentations	Team presentations		Final Team Funding Recommendations Report and Presentation

#	Date		Session	Topics	Items to Read / Steam	Individual HW	Team HW
25	TH	4/6	<b>Team Grant Recs Presentations / Discussion</b> Assigned Teams Present  BG	Team presentations	Team presentations		
26	TU	4/11	<b>Bonus Funding Allocation Discussion:</b> Presentation, Discussion, and Decisions  TT/BG	Facilitated discussion on bonus funds and how they should be allocated	-	Position Paper #3: Montgomery / Equal Justice Initiative	
27	TH	4/13	<b>Evaluation &amp; Ongoing Engagement in PLAB:</b> Opportunities for Alumni  BG	More info on evaluation efforts including visit from past alums along with details on how you can stay involved with class and national network	<ul style="list-style-type: none"> <li>• Evaluation reports from class of 2021 and 2022 (to be provided in advance of class)</li> <li>• <a href="#">2023 Ambassador Conference Overview</a></li> </ul>		Final Funding Briefing Package (Mock Media Release & Funding Detail Doc)
28	TU	4/18	<b>Celebrating the Journey:</b> Giving Ceremony  TT/BG	Event featuring grantees and other guests to celebrate your amazing grants!	<ul style="list-style-type: none"> <li>• In person event featuring grantee guests, student speakers, etc.</li> </ul>		

#	Date		Session	Topics	Items to Read / Steam	Individual HW	Team HW
29	TH	4/20	<b>Self-Reflection &amp; What's Next: Onward!</b> TT/BG	Class recap, Fund disbursement next steps; Evaluation follow up next steps including volunteer assignments; Course feedback survey; Final words / comments	<ul style="list-style-type: none"> <li>• Milligan, Katherine and Jeffrey C. Walker. 2020. <a href="#">"Self-Inquiry for Social Change Leaders."</a> Stanford Social Innovation Review. April 8.</li> <li>• Davis, Mekaelia. 2020. <a href="#">"Risks for the Future We Want."</a> Stanford Social Innovation Review. July 23.</li> </ul>	Letter to Future You	
-	FR	4/28	-	-	-	National PLAB Post-Course Survey  Emory Course Feedback Survey	Team End of the Semester Peer Evaluation Survey