

Professor:	Adjunct Faculty - Professional Field Expert
Class Meetings:	Weekly
Classroom:	TBD
Office Hours:	By appointment
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Course Description:

This 15-week, 45 hours' course will lead students into a shift of mindset in where strategic philanthropy and the right investments converges into the practice of social change. Social change is the way human interactions and relationships transform cultural and social institutions over time, having a profound impact in society¹. It will introduce students into the theoretical, conceptual and practical frameworks regarding social change through philanthropy; as well as concrete practice in designing and implementing a philanthropic strategy.

Throughout the course, students will learn about best practices, latest trends, conceptual frameworks, grants processes, grantee and grantor cycle, decision making, and sustainability analysis through time. They will be provided with the knowledge, tools and skills needed to evaluate programs, organization and initiatives. Students will work in teams and function as a Board of Directors responsible for researching the needs of diverse entities, designing grant award criteria, drafting and distributing a request for proposals, reviewing submissions, selecting institutions to be awarded, experience the process of directing real money to a non-profit organization, designing a methodology for reporting, evaluating effectiveness, and promoting sustainability.

Objectives of the course:

At the end of the course the students should be able to:

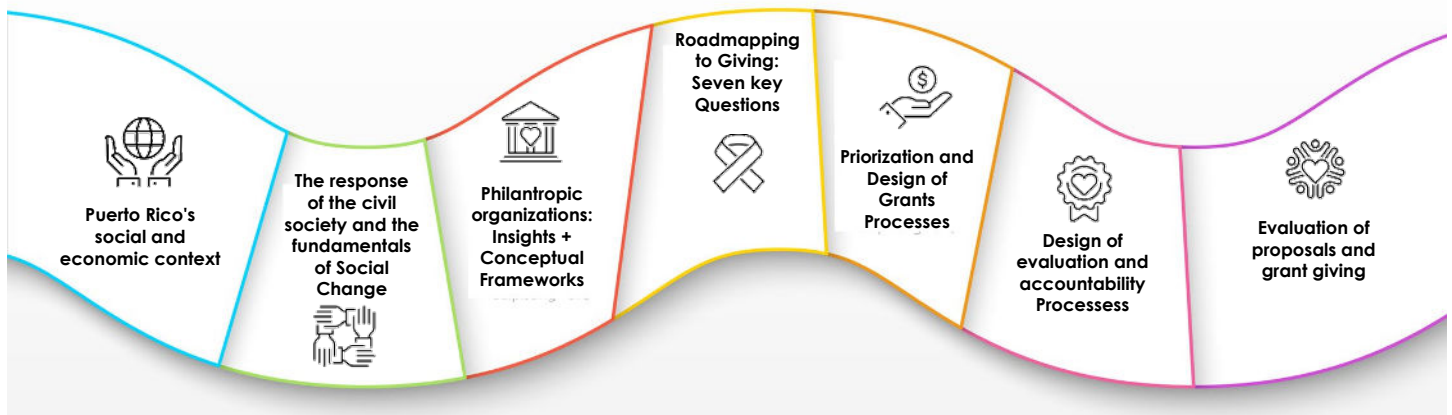
1. Be familiarized with the definitions of concepts such as "social change", "philanthropy" and "third sector".
2. Understand the theoretical and practical frameworks related to social change through philanthropy.
3. Differentiate between different philanthropic approaches, particularly strategic philanthropy.
4. Understand the relevance of research and analysis in the development of a philanthropic strategy.

¹ Theo, S. (2019) What is Social Change and Why should We Care? Retrieved from <https://www.snhu.edu/about-us/newsroom/social-sciences/what-is-social-change>

5. Understand how philanthropic entities and foundations operate, especially how their governing bodies decide where to direct resources and which entities to fund.
6. Acquire the knowledge and skills that will enable them to understand and apply the basic principles related to the design and implementation of a philanthropic and grantmaking strategy.
7. Learn how other disciplines, such as social marketing and relationship marketing, converge in creating connections, promoting change, and building long-term relationships with stakeholders.
8. Develop a perspective on best practices, recent trends, conceptual frameworks and processes related to philanthropic grantmaking.
9. Develop skills related to the evaluation of initiatives, programs and organizations in the Third Sector.
10. Learn the basic principles related to the development of a culture of sustainability in non-profit organizations.

Student Roadmap Course Overview Journey

Social Change: Sagrado's Students Philanthropy Lab Journey



Course Outline:

1. Intro to Course Methodology, Objectives and background on Puerto Rico's social and economic context- 1 class

Class Objective: This class will be an overview of what the course is about. Students will be introduced to the course methodology, requirements and grading processes. As well, this first class intends to provide students with a background on the social and economic situation of Puerto Rico with the purpose of providing the basis for the prioritization of those areas on which they will concentrate for the granting of funds.

2. The response of the civil society & fundamentals of Social Change - 1 class

Class Objective: This class will introduce students to the third sector its profile and impact and the basics and fundamentals of Social Change through the practice of Philanthropy. The conceptual framework behind Social Change will be explored and defined.

3. Conceptual Frameworks– 2 classes

Class Objective: Through these classes students will understand how to promote best practices in Philanthropy. They will learn about Strategic Philanthropy conceptual approach models. They will also be introduced to how other disciplines, including Social Marketing and Relational Marketing, converge in making connections, fostering change and promoting long-term relationships with stakeholders.

4. Road mapping to Giving - 1 class

Class Objective: These sessions will focus on answering seven key questions when defining a philanthropic initiative.

- 1) What is the purpose?
- 2) Who it will impact?
- 3) Why should we invest? Is it worth it?
- 4) How can it be accomplished?
- 5) How do you measure impact?
- 6) When can it be accomplished?
- 7) Is it sustainable?

5. Grantmaking Process- 4 classes

Class Objective: Students will learn all the details about the grantmaking process: request for proposal (RFP) allocation and RFP'S design, grant writing designing concepts, model grant award criteria, understanding grant evaluation rubrics and the grantee/grantor cycle. Various leaders of local foundations will be invited to participate in class to address these topics through the lens optic of their role in the grantmaking process. Students will learn about sustainable philanthropy and the principles for developing strategies focused on scalable and replicable solutions.

6. Design of Evaluation and accountability processes - 1 class

Class objective: students will learn about the basics related to the evaluation of grantee entities, accountability and sustainability, as part of their future commitment to contribute to the evaluation of funded initiatives.

7. Reviewing, evaluating, and selecting a grantee – 3 classes

Class Objective: During this class students will learn about the best practices in reviewing, evaluating and selecting a grantee. They will learn about the how to, the do's and don'ts in designing a grant funding letter and a grant funding denial letter. They will evaluate the proposals submitted by the entities and select those to be funded.

8. Course Wrap up and Team Journey - 1 class

Class Objective: During this class students will review all the main concepts, frameworks, best practices and techniques they learned during the course. Students will share their final presentation which will include their journey through the course, results and lessons learned.

Course Materials:

All course readings and materials will be available through Canvas platform.

Course Requirements and Grading:

Class Participation and attendance (10%)

Students should come to class having read and thought about the assigned readings. Regular and thoughtful contributions to classroom discussions are essential to the success of the seminar. Also, attendance matters. Your attendance will be considered in your overall participation grade. Finally, you will also be evaluated on your participation in your team.

Reflections (10%)

A total of 2 reflections will be assigned.

- First reflection: What is philanthropy and how does one contribute to social change through philanthropy.
- Second reflection: How has my perspective on philanthropy changed through the course and what are my future philanthropic goals.

The maximum value of the reflections is 20 points, and will be evaluated according to the rubric distributed in class.

Group exercises (60%)

Five exercises will be assigned throughout the semester, related to the final grant project. Each assignment will be worth 25 points. Specific instructions for the exercises will be provided in class.

These include:

- Priorization of areas of focus for the grants
- Development of rules for the work group and decision making
- Development of RFP package (including promotion) and identification of entities to be invited to participate
- Development of process and tool to evaluate proposals

- Selection grantees and award and denial letters

Memorandum and final presentations (20%)

In this final memorandum and presentation, students will elaborate on their journey through the course, results and lessons learned. Specific instructions of the work, will be provided in class.

Course Materials & References:

ON-LINE RESOURCES

1. Alliance for Justice: www.allianceforjustice.org
2. Aspen Institute: www.aspeninstitute.org/policy-work/nonprofit-philanthropy
3. Center for Community Change: www.communitychange.org
4. Chronicle of Philanthropy www.philanthropy.com
5. Council on Foundations: www.cof.org
6. Donors Forum of Illinois: www.donorsforum.org
7. Foundation Center: www.fdncenter.org
8. Independent Sector: www.independentsector.org
9. Internal Revenue Service: www.irs.gov
10. National Committee for Responsive Philanthropy: www.ncrp.org
11. Policy Link: www.policylink.org
12. Study on Puerto Rico's Non profit sector: www.https://filantropiapr.org/wp-content/uploads/2022/07/estudio-organizaciones-sin-fines-de-lucro-Puerto-Rico-2022.pdf
13. Urban Institute: www.urbaninstitute.org

PERIODICALS/JOURNALS

The Chronicle of Philanthropy. Washington, DC: The Chronicle of Philanthropy. (Published biweekly). The latest issues in philanthropic activity from case histories and people in the profession to statistical data on major contributions are covered in this newspaper. Sections can include fundraising, giving, foundations, corporations, marketing, management, volunteering, grants, international fundraising activities, and many other areas of philanthropy. (www.philanthropy.com)

Corporate Philanthropy Report. Gaithersburg, MD: Aspen Publishers, Inc. Provides an understanding of corporate trends in giving and has feature articles about corporate giving.

New Directions for Philanthropic Fundraising. San Francisco, CA: Jossey-Bass, Inc., (published quarterly). In each quarterly paperback, authors address themes related to fundraising management and technique, always keeping in mind the values of voluntarism and public benefit that 14 characterizes philanthropic organizations. The journal is sponsored by the Indiana University Center on Philanthropy and the Association of Fundraising Professionals (AFP).

The Nonprofit Quarterly. Boston, MA: Third Sector New England. (Published quarterly). This publication strives to provide nonprofit leaders a forum to exchange innovative ideas and informational resources. (<http://www.nonprofitquarterly.org/>)

Nonprofit and Voluntary Sector Quarterly (NSVQ). Thousand Oaks, CA: Sage Publications, Inc. (Published quarterly). The journal of the Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA), this is an international, interdisciplinary publication that reports on research and programs related to voluntarism, citizen participation, philanthropy, and nonprofit organizations. (<http://nvs.sagepub.com/>)

Philanthropy. Washington, DC: Philanthropy Roundtable (six issues are published yearly). Informative coverage of issues facing the field; discusses current issues in philanthropy. (<http://www.philanthropyroundtable.org/>)

Philanthropy Matters. Indianapolis, IN: The Center on Philanthropy at Indiana University. A publication of the Center on Philanthropy that includes news and reports on research as well as articles of interest to nonprofit sector personnel and academicians. (<http://www.philanthropy.iupui.edu/Research/PhilanthropyMatters/>)

Philanthropy News Digest. New York, NY: The Foundation Center (published weekly). News Digest with feature articles, columns and departmental news produced by the leading source of foundation information. (<http://foundationcenter.org/pnd/>)

Stanford Social Innovation Review. Stanford, CA: Stanford GSB (published quarterly). Strategies, tools and ideas for nonprofit organizations, foundations and socially responsible businesses. (<http://www.ssireview.org/>)

References

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