

EDUC 769-001

# Philanthropy and Higher Education

## Fall 2011

### *Course Syllabus*

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**The seminar will be held in room: 2340 in the School of Education Building unless a change is noted in the syllabus or announced in class**

### **Purpose of the Seminar:**

This seminar is organized to address two related themes. First, it provides a historical, philosophical, and organizational overview of the role and practice of philanthropy in the United States. This first theme is developed within the context of a society which is experiencing dramatic changes in its economic and political environment and one in which philanthropy plays an increasingly important role. Together we will explore the roots of philanthropy in Western thought, how it came to be integral to the formation of American public and private life, its impact on our institutions, and its contemporary expression and challenges. This theme is then considered in the specific context of American higher education with special reference to the ways that philanthropic trends are reshaping its values and practices. A second theme in the seminar draws on this overview and goes on to examine the implications for scholarship and practice in higher education that are associated with the increasing reliance on all forms of external support.

The seminar has attracted a number of different audiences over the last five years. It began as an introductory course for graduate students who might be considering a professional role in the broad area of philanthropy and advancement, but also proved of interest to aspiring higher education faculty and administrators who simply wanted to know more about this emerging field. It now includes both of those groups plus individuals who have some background in fund raising or non-profit management. In the past, a number of advanced undergraduate students and students from other institutions have been approved to take the course. In short, the seminar draws on a large and diverse

audience of students at many levels of their educational experience and from a range of undergraduate and graduate disciplines.

This seminar is one of two currently offered in the Center for the Study of Higher and Postsecondary Education as part of a specialized concentration on Philanthropy, Advancement and Development (PAD). For those enrolled in the PAD concentration both of these courses are required and this is generally the first course in the sequence (although they can be taken in either order). The distinction between the two courses is that this seminar begins with history, philosophies and key concepts. The second course (“Advancement and Development in Higher Education” ED 699) focuses on the organization and functional activities of higher education communication, alumni affairs, fund raising and strategy. Both seminars are pertinent for participants who are not adopting the PAD concentration, and in fact the majority of students enrolled in previous years have fallen into this category. The seminar also connects with an undergraduate program which is offered to introduce students to careers in philanthropy, the Development Summer Institute Program (D-SIP). This constitutes a unique package of inter-related course offerings organized with the goal of preparing more individuals with a sophisticated understanding of the world of philanthropy and its influence on society.

### **Overview:**

Philanthropy, and the various institutional efforts that encourage it, plays an increasingly important role in the vitality of American life and focuses has had a special role in influencing colleges and universities in the United States. Once generally thought of as the defining characteristic of private institutions, it now is a significant component in support of public institutions as well. This trend toward greater reliance of philanthropy for university innovation, support and distinction is indicative of a continuing evolution in our sense of what we think of as “private”, “public” and “independent” in our social and political economy, but the precise border between the public and private parts of colleges and universities has always been shadowy, as course readings will demonstrate.

The University of Michigan has integrated these elements of sponsorship and support since its founding. Michigan has often been described as a “Public Ivy”, and is currently viewed as an emerging model in American higher education: A great public university sustained and distinguished by significant private support. Because Michigan has a well established and particularly sophisticated infrastructure for raising external support with record setting results, we will occasionally draw on examples from the campus to illustrate some of the concepts of the seminar.

Philanthropy is a growing part of the culture of higher education, it operates within its own place in the larger societal culture, and in fact is a culture of its own, represented by its own traditions, norms, language and rituals. It is a culture whose most obvious activities are observed in the transfer of wealth, power and opportunity between individuals and institutions, even though the routine cultural practices of philanthropy may obscure this drama in studied nonchalance, veiled language and ritual. While success within the culture of fund raising as a sub-profession seems to be framed and

measured by countless transactions, the practice and spirit of philanthropy is both transactional and transformational<sup>1</sup>.

Through this seminar we will attempt to:

- establish a general orientation to the field of philanthropy,
- explore theoretical frameworks which lead to an understanding of the essential processes at work when resources are distributed to support a public cause,
- connect those frameworks to interests pursued through higher education institutions and in the field of education at large, and
- gain an exposure to current literatures and information sources that might be helpful to a faculty member, administrator or future donor with an interest in furthering educational opportunities.

Based on discussions with some of the students electing the course for this particular semester and feedback from previous years, we will also engage in a few “hands-on” activities as a way of introducing students to the philanthropic process and how it sustains and advances social improvement and the academic enterprise. We will give some focus to the role of major foundations and government sources that traditionally support research and innovation in higher education, and attempt, as much as possible, to give some exposure to how relationships with foundations are cultivated and managed. We will also examine the role and motivation of individual donors to higher education and have a brief exposure to how donors and their generosity are cultivated.

We also will be cooperating in an innovative program that provides the class, working as a collective, to experience some of the challenges associated with giving away money with the intention of promoting a public benefit. This opportunity, made possible through the support of a visionary foundation, will raise questions about efficacy, accountability, risk, pragmatism, ethics and sustainability. The individual and group responsibility associated with this aspect of the course will establish a nearly incomparable context for learning.

### **Setting Course Expectations and Summarizing the Teaching Strategy:**

The approach to the seminar and the underlying teaching strategy reflect a few assumptions:

**Students bring different experiences, motivations and learning styles to the classroom.** The implications of this observation not only include the challenge to bring a wide range of ideas forward through readings and discussion, but also the need to recognize that some students might be taking the class as a basis for further research, others to broaden their career opportunities and some out of a

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<sup>1</sup> Understanding this long and possibly over-written paragraph and the one that precedes it constitutes a significant challenge for the seminar. If, by December, we can better articulate the meaning and implications of these observations, we will have accomplished something!

general interest in higher education. Of particular interest to me is the way in which individuals from different life perspectives think about the practice of philanthropy, how the concepts of wealth and legitimacy are intertwined, and how philanthropy is understood from different cultural viewpoints.

**The subject matter (philanthropy and higher education) can be approached in a variety of ways.** As we will discover, much of what is written about philanthropy as a general subfield of study is derived from the work of practitioners, historians, and occasionally psychologists and economists. But there are many different ways to approach this seminar and we will try and entertain thoughts from a wide range of disciplinary and practice-related perspective. Furthermore, we will respect the tradition established by John Dewey when he taught pedagogy at the University of Michigan over a hundred years ago: we will use the “circumambulant experience of learning through action” to cement lessons from prior scholarship while enacting the process we are studying.

**Learning and philanthropy are each inherently transformational processes hidden in transactional exchanges.** This principle is central to the seminar. It has implications for the ways in which learning (and philanthropic exchange) go beyond a redistribution of information or resources between individuals and can have the larger impact of reshaping identities and purpose. This creates a shared opportunity for teacher and student (or beneficiary and benefactor) to expand the parameters of what passes between them and to take greater responsibility for the outcomes of their interaction.

How do these assumptions shape the teaching and learning relationship? Traditional course expectations (such as reading and writing assignments) will form the “transactional” spine of the seminar and there will be grades and feedback as typically surround teacher-student roles. But consistent with the theme of the course, we know that these things are largely incidental to the reason we are sharing time within the seminar. The greater goal is *to learn something, to think differently about the issues we consider and to build the capacity to act with greater effect in ways consistent with our personal and professional values.* We will want to keep our focus on these more transforming changes over the course of the semester---and beyond.

### **Readings:**

Consistent with the course description and teaching strategy, readings and assignments will be adapted when possible to fit individual learning objectives. I will be happy to work with any student who wants to tailor the readings to better suit their interests. But it is also important that we have some learning experiences in common, else the idea of a seminar is endangered.

There are a few books that I have found most important to those who want to participate in the seminar and they are required. These are the books by McCully’s “Philanthropy Reconsidered,” Dowie’s “American Foundations,” Prince and File’s well known book

that interrogates the motives and dispositions of donors, “The Seven Faces of Philanthropy”. There is also a fourth text, popularly known in the field as “Rosso” for the name of its original editor, which will be required for the *second* course in the PAD concentration. It is a good basic text for that course, and could be useful ---but not required--- for this course. I would suggest its purchase for someone entering the professional field of advancement and development, but it is high on practical advice and relatively low on empirical evidence. Most other required readings can be found on the Course-Tools site or will be provided by the instructor.

Recently, the Association for the Study of Higher Education published a collection of readings that are substantially related to this seminar. I have asked that this new volume be placed on Library reserve and I strongly encourage students to purchase it. While the narrative depth of this book is a bit shallow, the reference list can be very helpful, especially for students wishing to do further research in the field.

For each class meeting there are specific readings that have been identified to fit with a certain weekly topic. I sincerely hope and anticipate that every student will thoughtfully digest each of these readings and come to class with carefully considered reactions, well formed questions and original insights. Reading through an article or book chapter is not enough. Some of the readings are better endowed than others but please drill down for distinctions and nuances when you sense they may be available.

As suggested above, there are always more good readings to consider than we will have time to discuss. Therefore I have placed some additional resources on the C-tools web site. Many of these are quite interesting (or so I think). But it is up to members of the seminar to read them if they find the time to do so and think them appropriate.

Philanthropy and Higher Education, Fall 2011, Conceptual Framework			
Part 1: Background on American Philanthropy		Part 2: Philanthropy and U.S. Higher Education	
Week 1	Introductions, Overview, Mutual Expectations followed by an Initial Discussion of Themes to be Considered in the Seminar	Week 8	Understanding and Making a Case for Support
Week 2	Philanthropy and Capitalism Simulation Who Gives? To Whom? How? Why?	Week 9	Donor's Motivations and Behaviors
Week 3	Emerging Paradigms of Philanthropy and the Concept of the Public Good	Week 10	Donor's Motivations and Behaviors
Week 4	Philanthropy, Science and Progress	Week 11	Intergenerational Philanthropy: The Concept of Endowment and the Assertion of Permanence
Week 5	Philanthropy as both Transactional and Transformational Behavior	Week 12	Democracy Building
	INTRODUCTION OF CLASS PROJECT		CLASS PROJECT—COMMUNITY PRESENTATIONS
Week 6	Fall Break	Week 13	Higher Education and Philanthropy Partner to Extend Opportunity
Week 7	Philanthropy and Higher Education and their Motivations	Week 14	The Future of the Field and Roles within the Profession
			CLASS PROJECT--- Presentation of Grant Decisions

### Required Texts:

American Foundations: An Investigative History

Author: Dowie

ISBN: 0-262-04189-8

Publisher: MIT Press

*Available also on reserve at Shapiro Undergraduate Library*

The Seven Faces of Philanthropy

Author: Prince and File

ISBN: 978-0-7879-6057-5

Publisher: Wiley Periodicals

*Available also on reserve at Shapiro Undergraduate Library*

Philanthropy Reconsidered

Author: McCully

ISBN: 978-1-4389-0561-7

Publisher: AuthorHouse

*Available also on reserve at Shapiro Undergraduate Library*

Philanthropy and Fundraising in American Higher Education  
ASHE Higher Education Report, Vol. 37, No. 2  
Author: Drezner  
ISBN: 978-1-1181-1033-1  
Publisher: Wiley Periodicals

A very good text that is *not* required for this course but recommended for those entering the field of fund raising in higher education:

Achieving Excellence in Fund Raising  
Author: Rosso, Tempel  
ISBN: 078796256-2  
Publisher: Jossey-Bass

### **Grading:**

#### **Class participation**

**30 points**

To receive fifteen (15) points under this criterion, a student would appear every time the class meets over the course of the semester (about 15 times), ready to contribute to the seminar with readings prepared and otherwise awake, intellectually alive and fully engaged. To receive twenty-five (25) points it will be evident from the discussions that a student will have consistently taken time to have deeply consider the readings as such but also show the ability to compare and contrast concepts and ideas in original ways, offer new insights and render good questions, and demonstrate a mastery of the larger emerging themes of the seminar. Preparation and ability to engage actively in discussions of case studies, with guest presenters and in the class project will be judged to be especially important. To receive thirty (30) points a student would meet all the expectations above and occasionally contribute to the seminar in ways that help us all to see new potential in an existing reading or by identifying new readings/issues for future semesters, and the student will consistently demonstrate a level of professional preparation consistent with successful practitioners in the field.

I will provide students with an interim participation grade about half way through the course so that they know where they stand in terms of this measure.

**Benchmark Information on Participation Grades from Previous Semesters  
2004 to 2010 (course offered 5 times)**

- N 52
- Range: 10.0 – 28.0
- Mean: 22.5
- Median: 23

**Class Project****20 Points**

The seminar has been fortunate to attract the interest of an anonymous private foundation which has committed some of its resources to ensure that philanthropy is better understood and more effectively practiced in succeeding generations. To substantiate this vision, the foundation has entrusted us---collectively---with a generous sum of money that must be allocated in support of one or more charitable organizations. How this money will be granted and to whom will be a collective decision made by the class. More information about this opportunity will be shared early in the semester.

One grade will be assigned to the entire class based on this exercise. The grade will not be based on the exact funding decisions reached by the class but will reflect the thoroughness of investigation, the quality of participation in the decision, the constructive integrity of the rationale underlying the decision, and the process of communication surrounding the announcement of the gift(s).

**Short Assignments: Special Contributions and Solicited Gifts:****20 points**

There will be frequent “short assignments” which are meant to either support the teaching learning process, allow individual students to demonstrate personal talents or explore personal interests. At the start of the term, these assignments will be given to the entire class (see weeks 1, 2 and 3). Later, there will be opportunities for individuals to showcase their abilities or to make a special contribution.

**Written assignments****20 points**

There will be two relatively short written assignments (due week 8 and at the final class session). The instructions for the writing assignments will be briefly outlined in the syllabus, elaborated in the syllabus, and confirmed in class. Each of the two written assignments will be valued up to 10 points.

**Final examination****20 points**

Believe it or not, previous students in the seminar have described the final examination in this course as having established the subject matter most firmly in their minds. I have emails to share (should they be needed) which attest to the pleasure students take in reflecting on this experience. Trust me.

Shortly after Thanksgiving, a set of questions will be posted in the C-tools site which will illustrate the elements of a final examination in the course. In effect, I will be suggesting what I believe is important to know having participated in this discussion over the term. Students are encouraged to work together in preparing answers for the questions (although they do not have to do so). We will discuss these and similar questions on the last day of class and identify, collectively, what themes and considerations should be incorporated into stunningly effective response papers.

A new set of questions will be posted to the C-tools site later that day and responses will be due five days later. Each paper will be graded independently.

**Typical grading scheme (based on a possible 110 points):**

**93+ A**  
**85-92 B**  
**76-84 C**

**(Plus and minus grades may also be assigned within these general ranges)**

**September 12, 2011**

**Week 1: Introductions, Overview and Mutual Course Expectations**

Before the first seminar please go to the C-Tools Site, become familiar with its organization, and download the ED 769 “Pre-test” that you will find there. Please read the instructions and fill it out (it will only take a few minutes) and *bring your completed answers to class*.

This constitutes the first “short assignment/special contribution” for everyone in the seminar. Your answers will not be graded but the completion of the assignment will be noted.



**What we will do on the first day:**

- Introductions
- Individual and Collective Learning Goals
- Purposes and Structure of the Seminar
- Course Expectations
- Introduction to the class project

**...and after the break...**

I will offer a brief conceptual overview of the seminar and we will review the “pre-test” of prior knowledge of terms and ideas from the field.

**September 19, 2011**

**Week 2: Philanthropy and Capitalism**

In advance of class, please access the “Giving USA 2011” report, using this link:  
[http://www.givingusa-digital.com/givingusa/2009/?sub\\_id=BCOh4ckGdi5cu](http://www.givingusa-digital.com/givingusa/2009/?sub_id=BCOh4ckGdi5cu)

There will be a set of questions posted on the C-tools site that you should be able to answer using the Giving USA information. Please place your answers in the drop box on the C-tools site by 5:00 PM on Monday before class.

This constitutes the second “short assignment/special contribution” for everyone in the seminar. Your answers will be graded.

**Class Simulation:**

Today’s class will begin with a simulation activity that will build on the readings for the next few weeks.

**Readings for Discussion<sup>2</sup>:**

Introduction and first chapter of *Philanthropy Reconsidered: Private Initiatives – Public Good – Quality of Life*, George McCully, AuthorHouse, 2008.

“On the Classical Meaning of Philanthropia,” Marty Sulek, *Non Profit and Voluntary Sector Quarterly*, June 2010

“On the Modern Meaning of Philanthropy,” Marty Sulek, *Non Profit and Voluntary Sector Quarterly*, May 2010

Lawrence J. Friedman and Mark D. McGarvie, *Charity, Philanthropy and Civility in American History*, Cambridge University Press, UK, 2003, (Chapter 1 “Philanthropy in America: Historicism and its Discontents”).



“This college, this university, is not maintained by its alumni and by the state purely to help its graduates achieve an economic advantage in their life’s struggles. There is certainly made a greater purpose, and I believe you recognize this.”

**Senator John F. Kennedy**

Remarks Given on the Steps of the University of Michigan Union  
October 14, 1960

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<sup>2</sup> Check for these and other readings on the C-tools site. All students who have enrolled as of September 8, 2011 will be given access to the site. Students who enroll after this point should send a note to the instructor and to Ms. Puffenberger at the email addresses list on the first page of the syllabus. You will be given access to the C-tools site within about 2 business days.

**September 26, 2011**

**Week 3: Philanthropy and the Concept of the Public Good**

**Readings for discussion:**

“The Gospel of Wealth”, Andrew Carnegie (excerpts) in *The Responsibilities of Wealth*, Dwight F. Burlingame editor, Indiana University Press, 1992.

“Jane Addam’s Views on the Responsibilities of Wealth” in *The Responsibilities of Wealth*, Dwight F. Burlingame editor, Indiana University Press, 1992.

“Philanthropy Under Capitalism” in *The Responsibilities of Wealth*, Dwight F. Burlingame editor, Indiana University Press, 1992.

“Some Reflections on the Historic Roots, Evolution, and Future of American Philanthropy.” Report of the President, Vartan Gregorian: Carnegie Corporation of New York, 2000.

Please also review the web site of the Carnegie Corporation of New York which can be found at: <http://carnegie.org/>

**Presentation:**

“The political economy of the United States and the role of philanthropy within it”

For good reason, we tend to associate the organization of our national economy, our national institutions, our structures of government and the traditions of independent responsibility with our national identity and character. But each of these arrangements has been the subject of debate throughout our nation’s history and collectively have roots in Platonic visions of “the Good Society” described over two thousand years ago. How the powers and responsibilities of personal and public agency are balanced remain contentious issues even today. Ultimately, the mediation between public, private and independent sectors represents some understanding of how we might best achieve a “public good” that promotes “life, liberty and the pursuit of happiness”, “a more perfect union” and the promise of “liberty and justice for all”.

## **October 3, 2011 Week 4: Philanthropy as a Means to Progress in Society and a Way to Solve its Problems**

### **Readings for Discussion<sup>3</sup>:**

American Foundations: An Investigative History, Mark Dowie, MIT Press, 2001, Introduction and Chapters 1-4.

Presentation:

“Problems and Solutions in Relationship”

Today’s readings offer an insight into the ways that philanthropy frames and addresses problems and closely examines the long history of foundation attempts to promote knowledge and extend educational opportunities across world societies.

But how do problems and solutions actually relate? Is there an answer for every important problem or is some form of misery and suffering inherent to the human condition? Why would anyone be concerned with a problem half a world away? Even more disturbing, can attempting to address problems by responding to their symptoms be questioned as a moral choice?

Please review the latest issue of The Chronicle of Philanthropy to be found at <http://philanthropy.com> and answer the questions posted on the C-tools site, examining the ways in which contemporary philanthropy is framing and addressing the problems of education and democracy.

## **October 10, 2011**

### **Week 5: Philanthropy: Transactional and Transformational Natures**

#### **Readings for Discussion:**

Philanthropy and Fundraising in American Higher Education  
ASHE Higher Education Report, Vol. 37, No. 2 (Drezner)  
Pages 17-26

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<sup>3</sup> To facilitate your access to reading material for the course copies of certain reading material have been made available on the seminar’s C-Tools site. We apologize that there are some compromises in quality of image, generally due to source material or handling. If you wish to read from original sources, the University of Michigan Library system has most of these materials.

"Transformational Giving and its Relationship to the Emerging Roles of Public Colleges and Universities" John Burkhardt, *International Journal of Educational Advancement*, Vol. 7 No. 2 (2007)

Strickland, S. (2008). Partners in writing & rewriting history: Philanthropy & higher education. *International Journal of Educational Advancement* 7(2):104-118.

Presentation:

"Transactional and Transformational Realities in Philanthropy"

We live in a world that is recorded in bits and bytes, where trillions of transactions can occur simultaneously in a single second, and where we sell, buy, barter and even steal without any real human interaction. But transactions don't define us adequately, in fact we have become immune to them in many ways---even as their number and importance increases exponentially every decade.

*Trans+formation* is a concept that does connote change at a very deep and formative level and our transforming relationships and experiences do tell us who we are. Furthermore, transformation suggests a process of change that spans beyond a single experience or person.

How do these words relate to the practice of philanthropy? What can we learn from the ways in which the words are used in appeals for support and the recognition of gifts? How do these distinctions play out in the context of our own lives?

### **Introduction and Discussion of Class Project**

Writers as different as St. Vincent DePaul and Andrew Carnegie have commented on how difficult it is to give away money wisely. If you have ever been in a position to do this with your own resources, you know that it can be easy to make a gift when faced with an emotional appeal, more difficult to practice philanthropy (as opposed to charity) in a thoughtful way.

As hard as it is to do alone and independently, it is harder still to do so by group consensus. All of a sudden assumptions and bias surface, and questions, motives and misgivings become expressed in words.

The seminar has been fortunate to attract the interest of an anonymous private foundation which has committed some of its resources to ensure that philanthropy is better understood and more effectively practiced in succeeding generations. To substantiate this vision, the foundation has entrusted us---collectively---with a generous sum of money that must be allocated in support of one or more charitable organizations. How this money will be granted and to whom will be a collective decision made by the class.

Today we will begin a discussion about how a group can make a decision to practice philanthropy with a fairly large sum of money.

**October 17, 2011**

**Week 6: Fall Break**

Even though there will be no class session on October 17, I am suggesting that students either meet face to face or use email in the two week hiatus between class sessions to explore some of the “ground rules” and questions they would like to discuss in our October 24 meeting of the seminar regarding the class project.

Please have someone develop a composite list of such topics and post it to C-tools no later than Monday, October 24 at 5:00 PM.

**October 24, 2011**

**Week 7: The impact of philanthropy on higher education**

Readings for Discussion:

“Philanthropy and American Higher Education,” Michael Rothschild, in Philanthropy and the Nonprofit Sector in a Changing America, Indiana University Press, 2001.

Cash, Samuel B. (2005) Private voluntary support to public universities in the late nineteenth century. *International Journal of Educational Advancement* 5(4):343-358.

American Foundations: An Investigative History, Mark Dowie, MIT Press, 2001, Chapter 6, “Food”.



Presentation:

“An Ecological Model for Understanding Philanthropy”

Since at its essence philanthropy is a “human systems process” in which shared action is taken in pursuit of a public good, philanthropy displays the properties of all complex organisms that share boundaries, a physical location, protective instincts, dynamism and yet a tendency toward homeostasis. Recognizing philanthropic effort from a systems perspective opens the imagination to a better understanding of why it continues to evolve alongside other aspects of social and cultural life.

### **First Group Discussions on Establish a Shared Approach to Class Project**

**November 1, 2011**

**Week 8: Understanding the Case for Support**

**How do Charities and Institutions Articulate their Legitimate Needs? How are they heard?**

With this class session we will be examining philanthropy as a discourse between partners with a shared goal of improving the human condition. One part of the partnership has a structure, goals, staff and access to clients. One part of the partnership has a vision for change and resources to support that change. We will be focusing on the communication processes that bring them together in action for the public good.

#### **Readings for discussion:**

Rosso, Chapter 6: Developing and Articulating a Case for Support

W.K. Kellogg Foundation Logic Development Guide, 2003, Available on line at <http://www.wkkf.org> (copies available on the Kellogg Foundation web site).

Other readings will be posted on the class C-tools site.

**First Writing Assignment:** Choose one institution or major program within a large institution which is currently soliciting support. Identify and assess the primary claims made in the appeal. (More information on the assignment will be found on C-tools).

**November 8, 2011**

**Week 9: Donor Motivations and Behavior (Introduction)**

**Grusec, “The Socialization of Altruism” (1982) and “The Socialization of Empathy” (1991) to be found on the C-tools site.**

**Discussion of Class Project---Setting a Goal, Parameters and Strategy for Decision Making**

**November 15, 2011**

**Week 10: Donor Motivations and Behavior (Part 2)**

**Readings for discussion:**

The Seven Faces of Philanthropy, Russ Alan Prince & Karen Maru File, Jossey-Bass, 1994, Chapters 1-8.

**Discussion of Class Project---Donor Panel---"If I could start all over...."**

This presentation will begin with a panel of donors who have supported the university or community projects and who, in the experience of the instructor, have maintained a very reflective posture toward their giving. We will ask them to reflect on their philanthropic activity and to provide us with any advice they have about approaching the class project.

**November 22, 2011**

**Week 11 Giving that Addresses Society’s Current Challenges or Giving for Institutional Permanence? The Debate about Endowments and their Roles**

**Readings for discussion:**

Rosso, Chapter 10: Building Endowment

University Fund Endowment Profile

Inquiry by U.S. Senate Committee on Finance

University of Michigan Response to the U.S. Senate Committee

**Presentation:**

“The Role of Endowments in the non-profit sector.” Could there be a case to be made for eternal life?

**Discussion of Class Project---Student Presentations  
(See instructions on C-tools)**

**November 29, 2011**

**Week 12: Philanthropy, Democracy and Community Building**

This session will focus on the University’s role in community engagement activities in various parts of Detroit and the Great Lakes region. We will be traveling to the Brightmoor neighborhood of NW Detroit where UM students and faculty have been active in leading several projects to strengthen community life. A course pack of reading materials will be posted prior to Thanksgiving.

**Please review the following web sites prior to our travels that day:**

W.K. Kellogg Foundation: <http://www.wkkf.org>

Charles F. Kettering Foundation: <http://www.kettering.org/>

Ford Foundation: <http://www.fordfoundation.org/>

Lumina Foundation: <http://www.luminafoundation.org/>

Carnegie Corporation of New York: <http://carnegie.org/>

The National Forum on Higher Education for the Public Good: <http://thenationalforum.org>

**Discussion of Class Project---The Role and Impact of Individual and Organizational Philanthropic Investments in Community Development**

**December 6, 2011**

**Week 13: Philanthropy's Role in Extending Opportunity to Others**

This session will focus on one of the essential roles of education which is to secure and extend opportunities for one generation to another. We will examine the role of philanthropy in the periodic debates about who should be given access to education and at what cost to them and to the public.

We will also be hearing from undergraduate students about their experiences in seeking an education and the role that private support played in their ability to go to college.

**Discussion of Class Project---The Role and Impact of Individual and Organizational Philanthropic Investments in Extending Opportunities**

**December 13, 2011**

**Week 14: Course Summarization and Final Discussion of Class Project**

**Readings for Discussion:**

The Future of Philanthropy: Economics, Ethics and Management, Susan U. Raymond, 2004 John Wiley and Sons, pages 291-294.

Bloland, Harland G. (2003) "No Longer Emerging Fund-Raising is a Profession". IJEA Journal.

American Foundations: An Investigative History, Dowie, MIT Press, 2001, "Epilogue"

**Preparation for Final Exam**

**December 20, 2011 (Consult Academic Calendar for Official Date and Time)**

**FINAL EXAM and**

**Private Announcement of Decisions Reached in the Class Project**

**Some Possible Framing Questions for the Decision Process**  
To Be Discussed and Chosen by Students as a Part of the Learning Process

- Who does the organization under consideration serve?
- Is there a geographic, an identified constituency, or an issue parameter that clearly defines the populations being addressed?
- Is the organization principally concerned with responding to immediate needs or in addressing systemic problems affecting their constituents or clients?
- Would an organization of this sort have existed 25 or 50 years ago? Will it exist 25 years from now?
- What is the underlying theory of action that best describes what the organization is trying to do?
- How intentional is the organization in finding ways to ensure that its clients will eventually transcend the circumstances that has them seeking assistance?
- How long do you think it may take to see an impact from this investment?
- How will you know you have made a difference?
- How similar or different are the individuals representing the organization when they are compared to those served?
- Are there leaders and an attitude of leadership that seems likely to ensure that the investment in this organization will yield results?
- What personal values or beliefs have influenced you to look seriously at the organization as a possible grantee and partner?
- What values and beliefs do you think are represented among your peers that seem important?
- Do you observe that the collective decision process was influenced more by emotion or rational judgment? Does it matter?
- How likely do you think it is that this investment will lead to a sustained change in the organization's success?