

Philanthropy and Social Change
SLAM 3060-01, Fall 2016
School of Liberal Arts Management Minor
Tulane University
15 Newcomb Hall

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To give away money is an easy matter and in any man's power. But to decide to whom to give it and how large and when, and for what purpose and how, is neither in every man's power nor an easy matter.  
(Aristotle)

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My father used to say, 'You can spend a lot of time making money. The tough time comes when you have to give it away properly.' How to give something back, that's the tough part in life. (Lee Iacocca)

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To help another human being may sound like a very simple process. Actually it is one of the hardest things that anyone can be called to do. (Allan Keith-Lucas)

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Philanthropy is commendable, but it must not cause the philanthropist to overlook the circumstances of economic injustice which make philanthropy necessary. (Dr. Martin Luther King)

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Unless someone like you cares a whole awful lot, nothing is going to get better. It's not. (Dr. Seuss)

## Course Description

Americans are generous people, and, according to one scholar, it's not that they're generous because they're rich—they're rich because they're generous (Gaudiani 2003). Philanthropy, the act of giving away money to support worthy causes, is seen as the third sector of the American economy, with billions of dollars being given away annually by individuals and philanthropic foundations to support the public good. And supporting the public good means everything from addressing pressing social problems such as homelessness and poverty to adding named dining halls to a beloved alma mater.

Giving away money—sounds easy, doesn't it? But here's the rub—giving away money *to help others* may be one of the most difficult things any of us will ever do—as an individual donating \$5 or as a board member of a large foundation deciding how to distribute hundreds of thousands of dollars in the most effective way. How do we know what would “help” someone? How do we know how much money it takes to help? How can we be sure the people we're “helping” are using the money the way we intend for them to use it? Why should there be any “strings attached” to our giving them money anyway? All of these questions and more go into giving away money to help others – no wonder it's so hard to do! Being socially responsible requires integrating our personal values with the surrounding context of social issues (what sociologist C. Wright Mills broadly referred to as the “sociological imagination”). Taking the sociological imagination a step further, being a socially responsible philanthropist requires that we see beyond our own values to incorporate the values and concerns of the affected community itself as we try to effectively address *their* personal concerns as related to *their* social context.

The social issue that we will be addressing this semester is poverty in New Orleans. In fact, according to reporter Rebecca Catalanello of the New Orleans Times Picayune, “thirty-nine percent of New Orleans children live in poverty” (NOLA.com, 2/26/2015), which is well above the national average. According to WDSU News, nearly 20% of Louisiana’s residents, generally, lived below the federal poverty level in 2014 (9/18/2015). People living in poverty can experience a plethora of problems resulting from their inability to access basic survival needs such as food and housing. Our class will ask: what is the role of philanthropy in addressing this problem? Besides just looking at this issue, you will get a taste of what it means to engage in socially responsible philanthropy—and why the process of giving away money is such a difficult one. A generous gift from the *Once Upon a Time Foundation* will allow each of you to have the opportunity to participate as part of a team to give away money to nonprofit organizations in the New Orleans area that, in one way or another, are trying to alleviate the problems associated with poverty. But before you can start to answer the questions we asked above and give away your allotted money, you first need to know some of the basics about philanthropy itself.

The primary objective of this course is to introduce you to the process of philanthropy, both intellectually and experientially. As more and more of the responsibility for the public good shifts from the government to the private sector, the significance and power of individuals and foundations at the center of philanthropic giving continues to grow. It is increasingly important, therefore, that you understand this burgeoning phenomenon so that you can make educated choices about whether, and how, to participate in this process over the course of your lifetime.

### **Required Readings**

Kass, Amy A. (ed.). 2008. *Giving Well, Doing Good: Readings for Thoughtful Philanthropists*. Bloomington, IN: Indiana University Press. (hereafter “Kass”)

Payton, Robert L. and Michael P. Moody. 2008. *Understanding Philanthropy: Its Meaning and Mission*. Bloomington, IN: Indiana University Press. (hereafter “P&M”)

Additional readings posted to Canvas (hereafter “C”).

### **Course Goals, Learning Outcomes, and Linked Assessment**

The overall goals of this class are (1) to introduce students to the concept of philanthropy, including its relationship to social justice and social change; (2) to encourage students to situate themselves in the philanthropic process for the short- and long-term; (3) to lead students to examine the areas of need in the City of New Orleans; (4) to give students hands-on experience in socially responsible philanthropic giving; (5) to encourage students to develop effective teamwork habits; (6) to increase students’ abilities to articulate, verbally and in writing, effective social arguments, and (7) to encourage students to think about how they can contribute to the public good over the course of their lifetime. In accomplishing these goals, over the course of the semester, students’ knowledge and skills will be enhanced in a number of ways, congruent with the following specific objectives. By the end of the semester, students will:

- (1) have a working understanding of how philanthropy operates,  
--assessed via reflection papers, team presentations, team briefing book, and class participation;
- (2) be cognizant of their underlying values and assumptions about the process of “giving,”  
--assessed via Reflection Paper #1 and class participation;
- (3) be able to think critically about philanthropy and strategize philanthropic giving in terms of its ability to alleviate social problems,  
--assessed via reflection papers, team presentations, team briefing book, and class participation;
- (4) be an effective team member, working with others to make decisions and resolve individual differences,  
--assessed via team participation and team presentations;

- (5) be able to argue in favor of, or in opposition to, various philanthropic investment strategies, both in oral presentations and in written assignments,  
--assessed via team presentations, team briefing book, Reflection Paper #2, class participation, and various in-class exercises and debates;
- (6) be able to envision a lifetime giving plan for themselves and have sufficient initial understanding of the philanthropic process to decide their level of participation,  
--assessed via class and team participation and Reflection Paper #2.

### **General Structure of the Course**

The course will be structured around two interwoven components. The academic component of the class will include some lecture, but mostly class discussion designed to inform, directly and indirectly, your approach to the experiential (“Lab”) part of the class, which will include small group work, agency site visits, and the hands-on development of a strategy for effectively distributing team funds. We will also have guest speakers from time to time, people who are working (or have worked) in philanthropy and can share their experiences with you. Because the class meets twice weekly, this bi-dimensional approach will often (but not always) be similarly structured, with one day devoted to class discussion and the other to lab “team” work.

The class has received \$50,000 from the “Philanthropy Lab” initiative of the *Once Upon a Time Foundation* to invest in nonprofit organizations in the New Orleans area that address issues of poverty in the area. In association with Tulane’s Center for Public Service, we have developed a list of organizations, which we have grouped into five basic issue areas oriented around alleviating poverty, and around which five student teams will be developed. Each team will receive a list of nonprofits addressing that team’s particular social issue. Over the course of the semester, each team is expected to develop an argument and philanthropic plan to fund one or more of their nonprofits, based on team-developed criteria. To do so, students will participate in team discussions to establish a team mission statement, organized around a specific social problem addressed by the organizations on their list. Team members will be expected to visit their prospective grantee agencies, engage with agency personnel, and do other research as necessary to develop relevant information needed to inform their decision making process. Additional team discussion will lead to development of a funding plan that will be presented to the class at the end of the semester. For each team meeting, a facilitator and a recorder will be assigned, on a rotating basis, to assure that discussion moves smoothly and accurate records are kept. Due to the nature of the team experience, students should expect to spend some time outside of class doing site visits and otherwise working towards development of their funding plans. On occasion we may convene additional class sessions to accommodate such things as visiting speakers’ schedules.

At the end of the semester, all of this work will culminate in an award-presentation party, where each team will present a “large” check to its chosen organization(s). This award ceremony is scheduled for our “final exam” day, which will be **Friday, December 16, from 8:00 am to noon**. Attendance at the ceremony is mandatory.

### **Course Requirements**

**Attendance:** Students are expected to come to class (both on discussion days and lab days) fully prepared, having read and understood all assigned readings and having completed all assigned exercises beforehand. Because of the close interrelationship of the hands-on lab portion of the course with the academic portion, and the fact that each student is a vital component of their team, attendance is critical— all students are expected to attend all classes, and lapses in attendance will affect a student’s grade for the course. We will be taking attendance throughout the semester. As noted above, attendance at the award ceremony on Friday, December 16, from 8:00 am to noon, is mandatory.

**Professionalism:** You will be interacting on a frequent basis with prospective grantees as you conduct site visits and gather information from them. Please remember that you are representing not only yourself and

this class when you do so, but also Tulane University. During such interactions and at all times, we expect you to maintain the highest standards of professionalism, including respecting and maintaining agency confidentiality and that of their clients.

**Americans with Disabilities Act for Students with Special Needs**

“Any students with disabilities or other special needs, who need special accommodations in this course, are invited to share these concerns or requests with the instructor and contact Goldman Center for Student Accessibility: <http://accessibility.tulane.edu> or 504.862.8433.

**Code of Academic Conduct**

“The Code of Academic Conduct applies to all undergraduate students, full-time, and part-time, in Tulane University. Tulane University expects and requires behavior compatible with its high standards of scholarship. By accepting admission to the university, a student accepts its regulations (i.e., Code of Academic Conduct: <http://tulane.edu/college/code.cfm>, Code of Student Conduct: <http://tulane.edu/studentaffairs/conduct/code.cfm>) and acknowledges the right of the university to take disciplinary action, including suspension or expulsion, for conduct judged unsatisfactory or disruptive.”

Please ask me if you have any questions about this policy and its application to this class.

**One Wave**

Tulane University recognizes the inherent dignity of all individuals and promotes respect for all people. As “One Wave,” Tulane is committed to providing an environment free of all forms of discrimination based on race, ethnicity, creed, religion, gender, gender identity and sexual orientation, as well as all forms of sexual harassment, including sexual assault, domestic and dating violence, and stalking. If you (or someone you know) has experienced or experiences discrimination, domestic violence, sexual assault or sexual harassment, know that you are not alone. Resources and support are available. Learn more at [onewave.tulane.edu](http://onewave.tulane.edu). Any and all of your communications on these matters will be treated as either “Strictly Confidential” or “Mostly Confidential” as explained in the chart below.

| <b>Strictly Confidential</b>                                                                                                                 | <b>Mostly Confidential</b>                                                                                                                                                                                     |
|----------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Except in extreme circumstances, involving imminent danger to one’s self or others, nothing will be shared without your explicit permission. | Conversations are kept as confidential as possible, but information is shared with key staff members so the University can offer resources and accommodations and take action if necessary for safety reasons. |
| <b>Counseling &amp; Psychological Services (CAPS)   (504) 314-2277</b>                                                                       | <b>Coordinator of Violence Prevention   (504) 314-2161</b>                                                                                                                                                     |
| <b>Student Health Center   (504) 865-5255</b>                                                                                                | <b>Tulane University Police (TUPD)   (504) 865-5911</b>                                                                                                                                                        |
| <b>Sexual Aggression Peer Hotline and Education (SAPHE)   (504) 654-9543</b>                                                                 | <b>Office of Institutional Equity   (504) 862-8083</b>                                                                                                                                                         |

**Assignments and Grading:**

Assignments for the course include:

1. Various (announced and unannounced) in-class debates and exercises (10% total);
2. Writing two reflection papers (30% total);
3. Participating in two team-level presentations (15% total)
4. Preparation and submittal of a team “briefing book” (30%)
5. Active and thoughtful participation in class discussions (10%)
6. Active and thoughtful team participation as assessed by team members (5%)

Specifically, assignments include:

**1. Various in-class debates and exercises (10% total)**

Over the course of the semester, you will be asked to take part in various formal and informal debate sessions, panel discussions, and other in-class exercises that will draw from the course readings. These debates/exercises may or may not be announced beforehand. When we engage these debates/exercises, you will be evaluated on your grasp of the readings and your ability to apply the readings to the various exercises. **If it appears that students are not doing the reading, then we reserve the right to give unannounced pop quizzes over the readings.**

**2. Two reflection papers (30% total)**

a) Reflection paper #1. This paper will address your current philosophy and experience of giving, drawing on times that you have donated money, or volunteered your time, to a social cause. In it, you will be expected to explore your values and beliefs about giving and what motivates you to give or refrain from giving. Guidelines will be posted on Canvas. (10%)

b) Reflection paper #2. This paper will give you the opportunity to wrap up and reflect on the experience of participating in the grantmaking process this semester. You will be expected to return to your earlier values, beliefs, and motivations about giving and reflect on whether (and how) the class experience has caused those beliefs to change or not. Most importantly, this paper will allow you to think about whether or not you will engage in philanthropy in the future – and, if so, how will you approach your plan for giving? I will expect you to draw from your readings over the course of the semester, and reflect on how they have affected your future engagement with philanthropy. Guidelines will be posted on Canvas. (20%)

**3. Two team presentations (15% total)**

a) Presentation #1 (15 minutes, including questions). This presentation is your team's opportunity to introduce itself to the class, including your issue, your mission, and your slate of possible grantees. It is also your opportunity to get feedback from the class on how to approach your site visits. (5%)

b) Presentation #2 (30 minutes, including questions). This presentation is your team's opportunity to present its final funding decision to the class. The purpose is to deliver a persuasive argument to classmates, informing them of your position about what you want to do and why. (10%)

**4. Team Briefing Book (30%)**

Each team will be expected to develop a single "briefing book" that addresses how they reached their funding decision. This briefing book will essentially provide a detailed look at what you've done as a team over the course of the semester. Detailed guidelines, including specifications for content, will be discussed in class and posted on Canvas. Although each team will turn in one briefing book, it should represent the effort of all team members – each team member will receive the same grade on the team briefing book **UNLESS** one or more members is reported by a majority of the team to be under-participating in the process. The briefing book will be turned in twice during the semester, with the first draft due **October 20** and the completed final Briefing Book due **December 8**.

**5. Class participation and Attendance (10%)**

Students are expected to participate fully and thoughtfully in all class discussions. This means that each student must come to class prepared to discuss by having completed all reading and assignments beforehand. Please note that this portion of your grade will be affected by both attendance and participation.

**6. Team participation (5%)**

Each student is expected to be an active participant in team activities, including, among other things, discussion, site visits, decision making, and involvement in preparation of the team briefing book. Free riders are not only unconstructive in and of themselves, but they shift the burden of work to their team members. For this reason, each student will be evaluated anonymously by their respective team members on the last day of class in terms of active, constructive, and effective team participation.

Each team will be expected to keep their “Team Page” on Canvas up-to-date with minutes of team meetings and other team documents to be discussed in class—one team member should be designated to make sure that the Team Page is always up-to-date. All team members will have access to these Team files and can add notes or information to them at any time; team members are encouraged to add newspaper articles or other miscellaneous information that contributes to the store of information that the team can draw on. These materials will be very important as you work together towards your funding decisions. These materials will also be used to develop the briefing book that each team will produce to submit after funding decisions have been made.

**Course Grading Criteria:**

|                                           |            |
|-------------------------------------------|------------|
| In-class exercises, debates (various)     | 10%        |
| Team Presentation #1 (Oct. 18, 20)        | 5%         |
| Team Presentation #2 (Nov. 29, Dec. 1, 6) | 10%        |
| Reflection Paper #1 (Sept. 15)            | 10%        |
| Reflection Paper #2 (Dec. 16)             | 20%        |
| Class participation and attendance        | 10%        |
| Team participation                        | 5%         |
| Team Briefing Book (Dec. 8)               | <u>30%</u> |
| Total                                     | 100%       |

Tentative Schedule  
SLAM 3060-01, Fall 2016  
Philanthropy and Social Change

PLEASE NOTE: Schedule may change due to availability of guest speakers and other factors beyond the instructor's control.

**Week 1: What is Philanthropy? Philanthropy and You**

August 30:

- Introductions and Overview of the Class (No reading)

>>> **Task:** For Thursday, familiarize yourself with the website of The Philanthropy Lab, <https://www.thephilanthroplab.org/default.aspx>. What is its mission? How does it go about fulfilling its mission? What are its values? How are these values seen in the classes it funds? Navigate around the site. Jot down some of the things that are of particular interest to you—bring those notes to class on Thursday.

>>> **Task:** For Thursday, go to the “Glossary of Philanthropy Terms” on our Canvas Site (“Resources Module”) and look up the following terms:

- 1) 501(c)3
- 2) private foundation
- 3) public charity
- 4) donor; donee

September 1:

Readings:

- Payton & Moody, *Understanding Philanthropy*, pp. 1-26 (P&M)
- Kass, “Introduction,” pp. xv-xxv (Kass)
- Dykstra, “What is a Grant?” pp. 79-81 (Kass)

**Week 2: Philanthropy and Personal Values: Why Give?**

September 6:

Readings:

- Hayakawa, “The Story of A-Town and B-Ville,” pp. 82-86 (Kass)
- Yunus, “A Hand Up, Not a Handout,” pp. 87-90 (Kass)
- Menninger, “Foundation Work May Be Hazardous to Your Mental Health,” pp. 127-135 (Kass)
- Barbusse, “The Eleventh,” pp. 136-139 (Kass)
- Franks, “Whatever Happened to Chris Olsen?” pp. 9-15. (Kass)
- Tierney & Fleishman, “What are My Values and Beliefs?” (C)
- Payton & Moody, *Understanding Philanthropy*, pp. 27-75. (P&M)

September 8: Lab Day – Turning Individual Values into Team Values

Reading:

- Gary, *Inspired Philanthropy*, pp. 31-39 (various) (C)

>>> **Team Task:** Meet with your team. First, appoint someone to act as a “facilitator” – someone who will guide team conversations for the day, and a recorder to take minutes for this week—note that the recorder and facilitator roles will rotate every lab session. Get to know your

teammates. What are your initial thoughts and experiences on giving? What do you believe you can add to the group process? What values and beliefs do you bring to the group (here you can draw on the exercises you completed in class on Tuesday)? Discuss how your team can negotiate a set of team values that is agreed to by all team members. Create a first draft of your team values statement, post that draft to your team page on the course Canvas site.

### **Week 3: Philanthropy and Social Justice**

September 13: Guest panel (TBC)

Readings:

- Kass, "Introduction to Chapter One: Goals and Intentions," pp. 1-3 (Kass)
- Shaw, "Social Justice Philanthropy: An Overview," pp. 1-21 (C)
- Cohen, "Philanthropy and the Role of Social Justice," pp. 28-33. (Kass)
- Cole, "The Urgency of Memory," pp. 67-71 (Kass)
- Jones, "Doors and Mirrors: Reflections on the Art of Philanthropy," pp. 46-53. (Kass)
- Singer, "What Should a Billionaire Give—And What Should You?" pp. 13-25. (C)
- Payton & Moody, *Understanding Philanthropy*, pp. 75-95. (P&M)

September 15: Lab Day – Problem Statement; Values Statement; Mission Statement

Readings:

- Brest & Harvey, *Money Well Spent*, pp. 3-36. (C)

Resources:

- Theory of Change youtube video: [https://www.youtube.com/watch?v=6zRre\\_gB6A4](https://www.youtube.com/watch?v=6zRre_gB6A4)
- Example of Theory of Change, youtube video: [https://www.youtube.com/watch?v=urU-a\\_FsS5Y](https://www.youtube.com/watch?v=urU-a_FsS5Y)
- Mackinnon, Amott, & McGarvey. "Mapping Change." (C)
- W.K. Kellogg Foundation, *Logic Model Development Guide*, pp. 1-14 (C)

>>> **Team Task 1:** Begin researching your team's initial slate of nonprofits. What do they do? What are their core programs? What specific problem(s) do they address? Remember that you can (but are not required to) add up to two nonprofits that are not on your initial slate—the only requirement is that they are 501(c)3 organizations. Drawing on your findings, begin to identify the problem "angle" on which your team will focus. From that "angle," start drafting your team's mission statement and final statement of values.

>>> **Team Task 2:** Divide up the nonprofits on your list for review. By the next Lab day on September 22, each team member should conduct an on-line review of one or two nonprofits from your team's list (or that the team proposes to add to the list). By September 22, each member should post a brief paragraph to the Team's Canvas page about each of the nonprofits they've reviewed.

>>>> **Assignment Due: Reflection Paper #1**

### **Week 4: Philanthropy in Practice: Ethics and Accountability**

September 20:

Readings:

- "Gates Foundation failures show philanthropists shouldn't be setting America's public school agenda." Los Angeles Times editorial, June 1, 2016.  
<http://www.latimes.com/opinion/editorials/la-ed-gates-education-20160601-snap-story.html>
- Kass, editor. "Chapter Five: Accountability" (Introduction and all readings), pp. 313-407. (Kass)
- Orosz, "The Ethics of Grantmaking," pp. 252-261. (C)

September 22: Lab Day

- Gary, *Inspired Philanthropy*, “Creating a Mission Statement,” pp. 63-72. (C)

>>> **Team Task:** Collectively develop a final draft of your mission statement and values statement. Post these documents to your team page on Canvas. Discuss the reviews of the nonprofits that your team members have posted to Canvas; compare these agencies’ mission statements and values to your team’s mission and values. Begin to narrow down your list to the 4 nonprofit organizations that best “represent” your team’s mission and values.

### **Week 5: From “Traditional” Philanthropy to “Philanthrocapitalism”**

September 27

Readings:

- Payton & Moody, *Understanding Philanthropy*, “The Social History of the Moral Imagination,” pp. 131-154. (P&M)
- Sievers, *Civil Society, Philanthropy, and the Fate of the Commons*, “Philanthropy, Civil Society, and the Commons,” pp. 122-144. (C)
- Carnegie, from *The Gospel of Wealth* (Kass)
- Bishop and Green, “Philanthrocapitalism Rising” (C)
- Jenkins, “Who’s Afraid of Philanthrocapitalism?” (C)

September 29: Lab Day

>>> **Team Task 1:** Collectively settle on your list of top four nonprofits. Carefully document why you have decided to eliminate or to keep each organization on your final list. Post your list of “finalists” to your team Canvas page, along with the contact information (contact name, mailing address, email address) for each organization. Your instructors will send letters of introduction to these organizations prior to your contacting the organization.

>>> **Team Task 2:** Begin doing in-depth research into the problem of poverty in New Orleans, using your issue area as a lens. What is the extent of the problem? What efforts are currently underway to solve it? Why does this problem require your team’s attention? Why is it important to address? Write up a one-page summary of the problem of poverty in New Orleans from your team’s perspective and post it to your canvas page by October 6. You may do this work and write-up collectively or assign individual segments of research and writing to each team member.

### **Week 6: Prudent Giving and Due Diligence**

October 4: Guest speaker (TBD): How to Research (and Choose) Potential Grantees

- Friedman, Chapter 5: “The Paucity of Helpful Information,” from *Reinventing Philanthropy*. (C)
- Friedman, Chapter 7: “The Most Important Decisions,” from *Reinventing Philanthropy*. (C)
- Friedman, Chapter 10: “Choosing a Charity,” from *Reinventing Philanthropy*. (C)
- Brest & Harvey, *Money Well Spent*, pp. 71-85. (C)

October 6: Lab Day: Information Gathering / Application for Funding / Request for Site Visit

Resources:

- La Piana Consulting, “Due Diligence Done Well: A Guide for Grantmakers.” (C)
- The Bridgespan Group, “How to Research a Nonprofit—Light-Touch Approach.”

>>> **Team Task:** Decide what information you will need to get from your “finalists” in order to help you make funding decisions. Make a distinction between the information you can need “on paper” (mostly financial info) and the information you will get on a site visit. Develop an “application for funding” that you will send to your finalists. Send out your “applications for funding” to your selected finalists (they will be expecting to hear from you). Make sure to note a deadline by which they need to respond--that deadline should be October 18. **In the email to each of your finalist nonprofits, suggest a proposed day and time for a site visit—please note that we have set aside the week of October 24 for possible site visits.**

### **Week 7: Effectiveness and Evaluation / Fall Break**

October 11:

Readings:

- Kass, editor. “Chapter Four: Effectiveness” (Introduction and all readings), pp. 236-312.
- Additional readings TBD

October 13: NO CLASS – FALL BREAK!!

### **Week 8: Team Presentations #1**

October 18:

>>>> Team Presentations #1 (3 teams)

October 20:

>>> Team Presentations #1 (2 teams)

Lab Day (remainder of class time)

>>> **Team Task:** Assess the information that has come in from your applications for funding. Begin to create a preliminary ranking of finalists. What additional information will you need from these nonprofits during your site visits? Create a list of questions that you will ask the nonprofits—post the list of questions to your team Canvas page. Assign a team member to coordinate all site visits. Decide which team members (in teams of 2 to 3) will visit which sites; every team member should visit at least two sites.

>>>> **First Draft of Team Briefing Book Due.** This draft will not be graded, but will allow instructors to give feedback to each team in order to facilitate development of the final team briefing book. All of the team process up to the site visits should be included in this first draft.

**OUTSIDE OF CLASS Lab Day (if needed):** Finalize site visits and questions you will ask each nonprofit you visit.

### **Week 9: SITE VISITS**

October 25: Site visits

Readings:

- Orosz, *The Insider’s Guide to Grantmaking*, “Site Visits,” pp. 130-142. (C)

- Emerson, Fretz, & Shaw, *Writing Ethnographic Fieldnotes*, "In the Field: Participating, Observing, and Jotting Notes," pp. 17-39. (C)
- Eisenberg, "Penetrating the Mystique of Philanthropy: Relations between Fund Raisers and Grant Makers," pp. 123-126 (Kass)

Resources:

- The Bridgespan Group, "Quick Guide to Conducting a Nonprofit Site Visit." (C)
- The Bridgespan Group, "Guide to Interviewing a Nonprofit's CEO." (C)
- The Bridgespan Group, "Guide to Interviewing a Nonprofit Board Member." (C)

October 27: Site visits

**Week 10: Take a Breath, Assess Your Progress**

November 1: Possible Film / Guest Speaker (TBD)

November 3: Possible Film / Guest Speaker (TBD)

**Week 11: Seeking Grants / Fundraising for Nonprofits**

November 8: Guest Speaker (TBD)

Readings:

- Orosz, *The Insider's Guide to Grantmaking*, pp. 143-166. (C)
- Additional readings TBD

November 10: Lab Day

>>> **Team Task:** Discuss and evaluate site visits. Begin to rank finalists based on initial assessments. Is there any additional information you need? If so, email the relevant nonprofit(s) for that information.

**Week 12: Decision Tools and Final Deliberations**

November 15: Decision Tools / Lab Time

Readings:

- Engelhardt, "Foundation Grants and the Grantor/Grantee Relationship," pp. 145-148 (Kass)
- Payton & Moody, *Understanding Philanthropy*, "The World Can Be Made Better: Philanthropy as Moral Action," pp. 96-130. (P&M)

Resources:

- Adams, "Developing a Decision Matrix." (C)
- MindTools, "Decision Matrix Analysis." (C)
- MindTools, "Decision Matrix Analysis Worksheet." (C)
- The Bridgespan Group/GiveSmart, "Donor Decision Tool." (C)

>>> **Team Task:** Begin final deliberations. Rate and rank nonprofits, make initial funding decisions. Be sure to document how you went about making those decisions.

November 17: Lab Day

>>> **Team Task:** Final deliberations, revisit initial decisions, make final funding decisions. Draft an email to be sent to each organization that you visited telling them whether or not you have decided to fund them and, briefly, why. Please send drafts of both emails to Prof. Adams and Tait for review—DO NOT send these emails to the organizations until you have received approval from either Prof. Adams or Tait. Plan for team presentations.

### Week 13

November 22: Lab Day

>>> **Team Task:** Work on assigning tasks for upcoming presentations and development of the Final Team Briefing Book.

November 24:

No class – **Have a Happy Thanksgiving!!**

### **Week 14: Team Presentations**

November 29:

>>>> Team Presentations #2 (2 teams)

December 1:

>>>> Team Presentations #2 (2 teams)

### Week 15: Philanthropy and You (Revisited)

December 6: Team Presentations #2 (1 team)

>>> **Team Task:** Team work on Briefing Book / Prepare for Awards Ceremony

December 8: Opportunities in Philanthropy / Class Wrap-Up / Final Thoughts

- Payton & Moody, *Understanding Philanthropy*, “Philanthropy, Democracy, and the Future,” pp. 155-174. (P&M)
- Kass, ed. Chapter Six: Philanthropic Leadership (part), pp. 408-410 and 441-471. (Kass)

>>>> **Final Team Briefing Book Due**

### Friday, December 16: Final Exam Date and Awards Presentation

>>>> **No final exam, but Reflection Paper #2 due on course Canvas site.**

### Awards Presentation

**Friday, December 16 from 8:00 am until noon.**

This is when the fun starts – on Friday, December 16, from 8:00 am to noon, at a place to be announced (probably in the LBC), we will have a party where awards will be presented. At that time, each team will make a brief presentation introducing their grantee organization(s), and they will award the check to a representative from that/those organizations. Attendance is **mandatory** at the awards presentation ceremony!

~~ **Have a Wonderful Winter Break!** ~~