

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-hour course will guide students toward a shift in mindset where strategic philanthropy and effective investments converge to drive social change. Social change refers to the transformation of human interactions and relationships, reshaping cultural and social institutions over time, with profound impacts on society.¹ The course will introduce students to the theoretical, conceptual, and practical frameworks of social change through philanthropy, as well as provide hands-on experience in designing and implementing a philanthropic strategy.

Throughout the course, students will explore best practices, emerging trends, conceptual frameworks, grant processes, the grantee-grantor cycle, decision-making, and sustainability analysis over time. They will gain the knowledge, tools, and skills necessary to evaluate programs, organizations, and initiatives. Working in teams, students will function as a Board of Directors responsible for directing real funds to nonprofit organizations by researching, designing grant award criteria, drafting and distributing requests for proposals, reviewing submissions, selecting institutions for funding, 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:

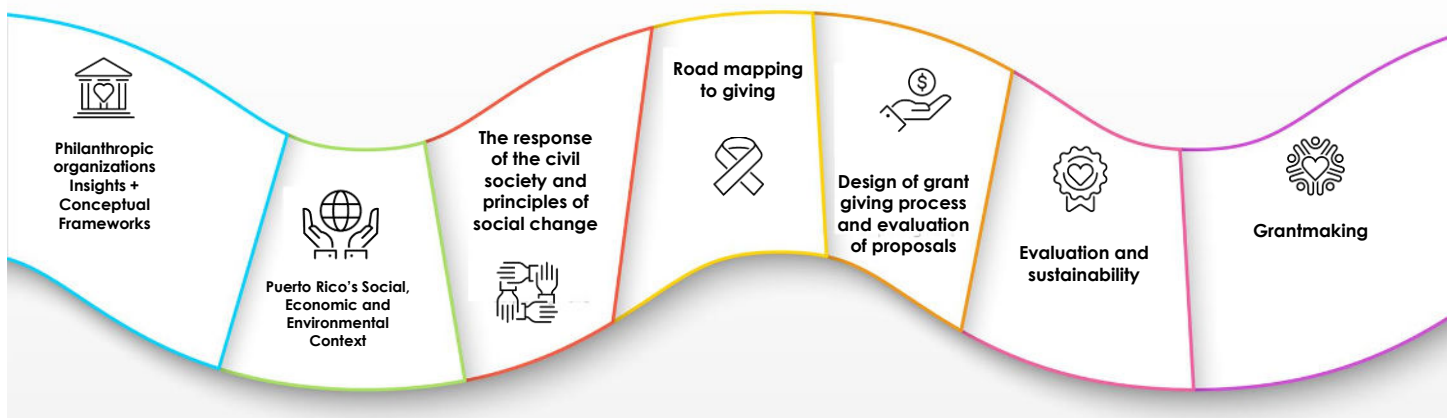
1. Be familiarized with the definitions of concepts such as "social change", "philanthropy" and "third sector".
2. Understand the theoretical and practical frameworks related to social change through philanthropy.
3. Differentiate between different philanthropic approaches, particularly strategic philanthropy.
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. Gain an understanding of governance by exploring how philanthropic entities and foundations operate, with a focus on how their governing bodies decide where to allocate resources and which organizations to fund.
6. Acquire the knowledge and skills 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. Introduction to the course and its methodology - 1 class

Class Objective: This class will provide an overview of what the course is about. Students will be introduced to the course methodology, requirements and grading processes.

2. Conceptual Frameworks– 1 class

Class Objective: Through this class, students will learn about the basic concepts and general trends of social change and philanthropy. The "ten-dollar exercise" will be discussed, and an activity will be conducted to help students begin visualizing themselves as philanthropists.

3. Puerto Rico's social, economic and environmental context and the response of the third sector- 2 classes

Class Objective: These two classes will provide a general overview of Puerto Rico's social, economic, and environmental situation to establish a foundation for prioritizing the areas on which students will focus when granting funds. It will also introduce the third sector's response to this complex context, including its profile and impact, as well as the basics and fundamentals of social change through the practice of philanthropy.

4. Foundations: organization, governance and approaches to *grantmaking* – 3 classes

Class Objective: These sessions will focus on understanding the organization, governance, and approaches of foundations in grantmaking processes. Students will explore in more detail the different models and tendencies in philanthropy, including: Strategic Philanthropy, Effective Altruism, Community Philanthropy and Trust Philanthropy, among others. Students will also learn about sustainable philanthropy and the principles for developing strategies focused on scalable and replicable solutions.

5. Grant making process - 3 classes

Class objective: Students will learn all the details about the grantmaking process: request for proposals (RFPs) design, grant writing concepts, 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. As a product of these discussions' students will design the invitation and application process for the organizations that will be considered for a grant.

6. Reviewing, evaluating, and selecting a grantee – 2 classes

Class Objective: During these sessions students will learn about the best practices in reviewing, evaluating and selecting a grantee. They will learn about how to, the do's and don'ts in designing a grant funding letter and a grant funding denial letter. As a product of these conversations' students will develop the rubric for evaluating the applications. They will evaluate the proposals submitted by the entities and select those to be funded.

7. Evaluation and accountability – 1 class

Class objective: As part of their future responsibility of evaluating the organizations that are funded students will learn about the basic concepts related to formative and summative evaluation.

8. Course Wrap up and Team Journey & organization of giving ceremony- 1 class

Class Objective: In this class, students will review the main concepts, frameworks, best practices, and techniques learned throughout the course. They will share their final presentations, which will include their journey through the course, results, and lessons learned. Additionally, they will finalize the details for organizing the Giving Ceremony.

9. Giving ceremony - 1 class

Course Materials:

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:

- Development of rules for the work group and decision making
- Exploratory research
- Development of RFP package (including promotion) and identification of entities to be invited to participate
- Development of process and tools to evaluate proposals and evaluation of 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 this final memo, 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/>)

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Olberding JC (2009) Indirect giving to nonprofit organizations: an emerging model of student philanthropy. *J Public Affairs Education* 15(4):463–492

Olberding JC, Hacker W (2016) Does the “service” in service-learning go beyond the academic session? Assessing longer term impacts of nonprofit classes on community partners. *J Nonprofit Educ Leadersh* 6(1):25–46

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philanthropyStudents-learning-to-give.html?pg=all The Philanthropy Lab (2015) Who we are. Retrieved from <https://www.thephilanthroplab.org/default.aspx>

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