



consideration. Students taking the course will help determine the goals of our philanthropy, the number and size of our gift(s), the mode of our awarding the gift(s), and our plans for evaluating the success of our gift(s). The work in this course will affect real lives in meaningful ways, and students will discuss and make moral judgments as they engage micro-decisions while considering macro-consequences. Students will direct and control \$100,000 (a donor-funded gift to the course); it is up to the students' collective wisdom to grant it responsibly under rules we create as a class and with the wisdom of an advisory board representing TCU.

Nature of Giving is designed to prepare students to live thoughtful, philanthropic lives. For some, the course will help students imagine how giving can become a vocation—particularly in non-profit organizations. For all, the course should point out the importance of giving as an avocation in the future.

### ■ **Course: Chronology and Philanthropic Work**

Few universities offer courses in philanthropy or grant making. An even fewer number offer those courses in areas outside business schools, public policy/management programs, and graduate courses. John V. Roach Honors College students taking Nature of Giving are fortunate to have this class because of a donor, one who is funding similar classes at the U of Michigan, the U of Pennsylvania, the U of Texas, the U of Virginia, Princeton, Yale, and Stanford. Because of this gift, TCU students will have the opportunity to both study *and* practice philanthropy by making substantial grants to a small group of nonprofit organizations.

Over the course of the first 5 weeks, studies of current and historical philanthropists will shape how students evaluate the operational strategies of local philanthropies. Starting week 3 and ending week 10, students will conduct due diligence research on regional nonprofit organizations, picking their personal favorites and assessing those organizations' potential suitability for receipt of the grant. Guest speakers, including representatives from the Once Upon a Time Foundation, TCU Advancement and Development staff, and last year's selected organizations will inform our research of regional nonprofit organizations.

For weeks 5 & 6, students will produce and read persuasive written descriptions (memoranda) about nonprofit organizations and vote for 10-14 finalist organizations. For weeks 7-10, students will divide into teams and complete background research (including on-site visits) on the finalist organizations, and then prepare a group presentation for the benefit of other students in the class.

In weeks 11-12 of the course, the five teams will present their persuasive arguments for donating either all or a part of the \$100,000 gift to "their" organization in a presentation. Finally, in week 13 and 14, the class will debate the merits of each organization and reach a consensus on which organizations(s) should receive funds.

During Dead Days/Finals Week, students will arrange a public presentation of the award(s) to the nonprofit organization(s) and reflect on what they have learned and experienced. Throughout the process, students will present their work to a committee representing various interests at TCU.

## ■ Course Objectives and Topoi

- To understand what philanthropy is: who it involves, how it operates, and its history.
- To review the various contexts of philanthropic foundations and how they have evolved into the organizations they are today.
- To analyze and debate the roles and responsibilities of philanthropic foundations.
- To participate in the philanthropic process: research organizations, perform due diligence, make proposals, persuade audiences to your cause, and debate merits, as well as to whom funds should be given.
- To make and discuss moral judgments, to make micro-decisions while considering the macro-consequences.
- To connect readings and discussions to real life through interactions with practitioners.
- To formulate and support an individual opinion on the subject.
- To develop critical analytical thinking and writing skills.
- To speak/argue persuasively and publicly through debates and meetings.
- To participate in a transformational course that reveals the responsibilities individuals must play to create a culture of giving.
- To understand why people give and why some choose not to give even when they have the resources.
- To question what would society look like if no one gave money to philanthropies.
- To determine whether donors should identify where funds should be spent within an organization.
- To determine what it means to “give away smartly.”
- To understand why giving is actually difficult.

## ■ Responsibilities of Colloquium Members

**Communicate effectively and clearly:** The colloquium requires students to write persuasively, speak effectively in public, debate ideas, listen carefully, conduct independent research and bring ideas from your own fields of specialization.

**Be professional, you are always representing TCU:** The written assignments have length limits because conciseness and professionalism are key. Be mindful of your status as representatives of TCU in all contacts with external organizations.

**Be dependable and present:** Because class progress will often depend on your work, it is important to provide assignments on time by whatever means necessary. Even if you have to miss, the class needs your work product—notes, memorandums, and evaluations. Regular attendance is crucial to success in this course. Only official university-sanctioned absences are excused. Students missing class either to represent TCU in a university-mandated activity or attend conferences for professional development should provide official documentation of schedules and turn in work *in advance*. Two absences will warrant lowering your final grade by a letter grade; three absences will result in your failing the course.

**Be prepared:** I expect every course member to read all of the assigned texts in advance of class and prepare for discussion by taking notes. As you read, plan to make at least two contributions to the discussion. A planned contribution is mulled over in advance of class and can take the form of a question, illustration of a point in the reading, a disagreement, or a contrast with other readings.

**Respect your colleagues:** Once in class, be prepared to listen to and work with colleagues. At all times be prepared to comment on colleague’s statements or to summarize perspectives that have been presented. Always treat seriously any comment offered in earnest. If you disagree with a colleague, clarify your position using appropriate evidence or explanation.

**Seek help when needed:** Course members are welcome to secure additional help on papers at the William L. Adams Writing Center (ext. 7221). For writing-center information visit <<http://www.wrt.tcu.edu/>> online. Students who receive tutoring—formal or informal—from individuals or programs other than the William L. Adams Writing Center are responsible for ensuring that the tutoring adheres to ethical standards consistent with those followed at the writing center (e.g., tutors do not write any portion of a student’s paper; tutors do not proofread; tutors do not assist students with take-home exams). Students whose tutoring does not meet such ethical standards violate the university’s code on academic misconduct and are subject to its penalties.

## ■ Basic Primer: Nonprofit Organizations in US



## ■ Texts / Membership

- Brest, Paul and Hal Harvey. *Money Well Spent: A Strategic Plan for Smart Philanthropy*. New York: Bloomberg, 2008.
- Bronfman, Charles and Jeffrey Solomon. *The Art of Giving: Where the Soul Meets a Business Plan*. San Francisco: Jossey-Bass, 2010.
- Chronicle of Philanthropy*.
- Tierney, Thomas J. and Joel Fleishman. *Give \$mart: Philanthropy That Gets Results*. New York: PublicAffairs, 2011.
- Zunz, Olivier. *Philanthropy in America: A History*. New Jersey: Princeton UP, 2011.

## ■ Resources

### General Sites:

- Idealist.org (clearinghouse for nonprofit ideas and news)
- NonprofitHub.com (large list of links organized by category)
- Urban Institute (general social and economic policy research institute, with section devoted to nonprofits and philanthropy)
- Guidestar (basic data covering nonprofits, including tax form 990 images; free but registration required)
- Harvest Today (nonprofit and philanthropy news service)
- Givewell.org (Research on Charities)
- National Center for Charitable Statistics (<http://nccsdataweb.urban.org/>)

### On Philanthropy:

- The Chronicle of Philanthropy* (national weekly devoted to covering philanthropy)
- The Non-Profit Times* (monthly news magazine)
- Center on Philanthropy at Indiana University ([www.philanthropy.iupui.edu](http://www.philanthropy.iupui.edu))
- EPhilanthropyFoundation.org (organization dedicated to promoting online philanthropy, includes ezine)
- Philanthropy News Digest (<http://fdncenter.org/pnd>)
- American Association of Fundraising Counsel (<http://www.aafr.org> : Organization dedicated to ensuring ethical behavior amongst philanthropies)
- The Philanthropic Initiative ([www.tpi.org](http://www.tpi.org) : offers strategic services to philanthropists)
- American Institute of Philanthropy ([www.charitywatch.org](http://www.charitywatch.org) : general purpose philanthropy website, including ratings of organizations)
- Center for Strategic Philanthropy & Civil Service (<http://cspcs.sanford.duke.edu>)
- Non-Profit Quarterly ([www.nonprofitquarterly.org](http://www.nonprofitquarterly.org))

## ■ Evaluation

In this class I will meet with you regularly to evaluate your progress. In order to receive a passing grade for this course, you must satisfactorily complete all major assignments on time with a cumulative passing average. Grades will be calculated using the following scale:

4.0 = A / 3.67 = A- / 3.33 = B+ / 3.0 = B / 2.67 = B- / 2.33 = C+ / 2.0 = C / 1.67 = D- / 1.33 = D+ / 1.0 = D

Response Papers .....	25%
<i>(Based on readings, discussions, guest speakers, research of local nonprofits, and class participation)</i>	
Evaluative White Papers / Memoranda to our Philanthropy .....	25%
<i>(Concise memoranda designed to persuade other students to consider your favored organization to be one of the finalist organizations.)</i>	

Group Presentation.....	25%
<i>(15-minute presentation to persuade other students to vote for your organization: 10% for the group as a whole and 15% your own component of the group work).</i>	
Final Project / Paper .....	30%
<i>(Based on readings, discussions, guest speakers, and research of local nonprofits)</i>	

■ **Tentative Schedule: 16 Weeks, 16 Days** (N.B.: I reserve the right to make changes)

**Week 1: 19 JANUARY: What is Philanthropy and What is “Nature of Giving”**

**Topics:**

- Introduction to course: syllabus, objectives, and organization
- Introduction to philanthropy and history
- Begin discussion of decision-making process and identifying variables

**Product:**

Start process of selecting five to six nonprofit (501(c)(3) organizations to profile for possible receipt of funding from the \$100,000. Your list of five organizations is due week 3 in class, hard copy.

**Week 2: 26 JANUARY: History and Evolution of Philanthropy**

**Topics:**

- Introduction to due diligence.
- Begin discussion concerning the state of philanthropy today and philanthropy as an industry: Buffet, Gates, Broad
- Examine what it means to manage wealth for social good
- Meaning of New Philanthropy
- Start conversations on the challenges facing investor decision-making

**Speakers:**

- David Nolan, Associate Vice Chancellor Development at TCU

**Product:**

**Readings:**

- Watch Bill Gate’s 2007 Graduation Speech at Harvard
- Selections from *The Art of Giving*
- Selections from *Philanthropy in America*
- Carnegie, *The Gospel of Wealth*
- Case Study: Yale, Mr. Lee Bass, and \$20M
- Rockefeller, John D. “The Difficult Art of Giving.” In *Random Reminiscences of Men and Events*. 139-162.

**Week 3: 2 February: History and Evolution Continued / Due Diligence**

**Topics:**

- Due Diligence

**Speakers:**

- Ann Loudon, Frogs for the Cure
- 2011 Recipients of Nature of Giving Funds:  
Hope Farm

Fortress  
The Warm Place

**Product:**

- White Papers on 4 local organizations / 1 national or international organization

**Readings:**

- Selections from *Money Well Spent*
- Selections from *Give \$mart*
- Website: The Giving Pledge <givingpledge.org>
- Website: The Broad Foundation <broadeducation.org>

**Supplementary Readings:**

- Phillips, Kevin. "Serious Money: The Three Twentieth-Century Wealth Explosions", Chapter 2 in *Wealth and Democracy: A Political History of the American Rich*. 47-68.
- Peter Dobkin Hall, "A Historical Overview of the Private Nonprofit Sector." Chapter 1 in Powell, Walter W. (editor), *The Nonprofit Sector: A Research Handbook*. 3-26.
- Byrne, John A. "The New Face of Philanthropy." *Business Week* 2 December 2002.
- Frumkin, Peter. "Inside Venture Philanthropy." *Society* May/June 2003. 40(4). 7-15.
- McGee, Susan. "Charity in the Round." *Robb Report Worth*. March 2004. 118-120.
- "New developments in philanthropy: how private foundations are changing international development." *International Trade Forum* 4(2009)
- Readings from: Kinsley, Michael. *Creative Capitalism: A Conversation with Bill Gates, Warren Buffett, and Other Economic Leaders*. New York: Simon Schuster, 2010.
- Readings from *The Chronicle of Philanthropy* on Buffett, Gates, and Broad; also on New Philanthropy
- Stannard-Stockton, Sean. "Gates and Buffett: Why Their Example Matters." *Chronicle of Philanthropy* 22:15 (11 July 2010).

**Week 4: 9 February : Identifying 100 Organizations**

**Topics:**

**Speakers:**

- Nature of Giving Alumni

**Product:**

- Prepare to Cut 100 to 40

**Readings:**

- Selections from *Money Well Spent*
- Selections from *Give \$mart*
- John J. Havens, Mary A. O'Herlihy, Paul G. Schervish. "Charitable Giving: How Much, by Whom, to What, and How?" Chapter 23 in Powell, Walter W. and Richard Steinberg, Eds., *The Nonprofit Sector: A Research Handbook*. 542-567.

- Readings from the *Chronicle of Philanthropy*
- Wolff, Edward. "The Economy and Philanthropy." *Philanthropy and the Nonprofit Sector in a Changing America*.
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**Week 5: 16 February: Presentation of Memoranda and Choosing**

**Speakers:**

- Bob Hopkins, Editor of *Philanthropy World*

**Product:**

- Memoranda on 40 semifinalists

**Readings:**

- Selections from *Money Well Spent*
- Selections from *Give \$mart*
- Selections from *The Art of Giving*
- Frumkin, Peter. "Central Problems in Philanthropy." *Strategic Giving*. 55-89.

**Week 6: 23 February : Choosing Finalists**

**Topics:**

- Students, having read and studied the memoranda, select finalists (12-15 organizations) and form Due Diligence / Presentation Groups.

**Speakers:**

- Tracy Syler-Jones, Vice Chancellor of Communications, TCU
- Adam Baggs, Development Director for John V. Roach Honors College

**Readings:**

- Selections from *Money Well Spent*
- Selections from *Give \$mart*
- Selections from *The Art of Giving*

**Week 7: 1 March**

**Topics:**

- Students start due diligence on finalist organizations—on site and through research
- Teams meet outside of class with Pitcock

**Week 8: 8 March : Field Work & Accountability**

**Topics:**

- Students continue due diligence on finalist organizations—on site and through research
- Teams meet outside of class with Pitcock

**Week 9: 22 March : SPRING BREAK**

**Week 10: 29 March : Field Work, Stewardship, and Preparing Proposals**

**Topics:**

- Students continue due diligence on finalist organizations—on site and through research
- Teams meet outside of class with Pitcock

**Week 11: 5 April**

**Group Presentations: Debate Chamber in Scharbauer Hall**

**Week 12: 12 April**

**Group Presentations: Debate Chamber in Scharbauer Hall**

**Week 13: 19 April: Debate Chamber in Scharbauer Hall**

**Debate Merits of Finalists**

**Week 14: 26 April: Debate Chamber in Scharbauer Hall**

**Decision Making: Final Decisions on organizations and amounts are due**

**Week 15: 3 May : DEAD DAYS**

**Product: Present Final Decision to TCU Advisory Group**

**Week 16: TUESDAY, 8 MAY @ 4:00 : AWARDS CEREMONY**