



notes, and ultimately, in Scharbauer Hall's Debate Chamber, argue the merits of each organization under 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 \$50,000 (a donor-funded gift to the course); it is up to the students' collective wisdom to grant these funds responsibly under rules we create as a class and with the wisdom of TCU.

Nature of Giving is designed to prepare students to live thoughtful, philanthropic lives. For some, the course will help 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 this course are fortunate to have this class because of a donor, one who has founded "The Philanthropy Lab" and is funding similar classes at Harvard U, Yale U, Stanford U, Princeton U, Northwestern U, the U of Michigan, the U of Pennsylvania, the U of Texas, the U of Chicago, the U of Virginia, Middlebury U, and UCLA. 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. To learn more about The Philanthropy Lab, please visit the following web site: <https://www.thephilanthropylab.org/>

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 2 and ending week 7, students will conduct due diligence research on nonprofit organizations, picking 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, the TCU Board of Trustees, the Fort Worth Zoo, TCU Donors, and last year's selected organizations—will inform our research of regional nonprofit organizations.

For weeks 7 & 8, students will produce and read persuasive written descriptions (memoranda) about nonprofit organizations and vote for 10-12 finalist organizations. For weeks 9-12, students will divide into teams and complete background research (including on-site visits) on the finalist organizations, and then prepare a formal publication and group presentation for the benefit of other students in the class.

In weeks 13-14, the teams will present their persuasive arguments for donating either all or a part of the \$50,000 gift to their assigned organization in a presentation. Finally, during weeks 15 and 16, the class will debate the merits of each organization and reach a consensus on which 3-4 organizations(s) should receive funds.

On Tuesday, May 6 at 5:00 pm, students will arrange a public presentation of the award(s) to the nonprofit organization(s) and reflect on what they have learned and experienced.

## ■ Course Objectives and Topoi

- To understand strategic philanthropy: an alignment of who, what, when, where, why and how.
- To understand the history and current dimensions of the nonprofit sector and philanthropy
- 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.

*We make a living  
by what we get.  
We make a life by  
what we give.*

— Winston S.  
Churchill

- 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. You are not students in many of the situations this course will place you: you are professionals with \$50,000 to give away responsibly.

**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

*Liberality lies  
not in the  
multitude of the  
gifts but in the  
character of the  
giver.*

--Aristotle



Salamon, Lester M. *The State of Nonprofit America*. 2<sup>nd</sup> ed. New York: The Foundation Center, 2012.  
 Salmon, Felix. "Donors Aren't Always Right. Here's How to Sidestep Their Misguided Ideas." *The Chronicle of Philanthropy* 13 January 2013. (online)  
 Stannard-Stockton, Sean. "Nonprofit Analysis: Beyond Metrics." *Social Edge* 2012. (Online)  
 Wallace, Nicole. "Effort Aims to Steer Gifts to Nonprofits That Get Results." *The Chronicle of Philanthropy* 2 December 2012. (online)  
 Zunz, Olivier. *Philanthropy in America: A History*. New Jersey: Princeton UP, 2011. (online excerpts)

## ■ 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/>)

*Kindness in words  
 creates confidence.  
 Kindness in thinking  
 creates profoundness.  
 Kindness in giving  
 creates love.*

— Lao Tzu

### 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
- Philanthropy News Digest (<http://fdncenter.org/pnd>)
- American Association of Fundraising Counsel (<http://www.aafrc.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))

## ■ Past Gifts Made by Nature of Giving Alumni

### 2013

Agua Para Todos	\$6,200	Motorcycles for transportation of well Workers
Communities in Schools of Greater Tarrant County	\$31,000	In-school tutoring and mentoring program for school in crisis
Feed By Grace	\$18,294	Gardening Program and Shelter
Fortress Youth Development Center	\$25,000	Transportation and setup for new building
Journey Learning Center	\$10,000	Ipads and Learning devices for affordable autistic treatment program
SafeHaven of Tarrant County	\$8,876	Mattresses & Washer/Dryer for shelter

### 2012

Fort Worth Hope Center	\$30,000	Full funding of dental clinic
Child Vision Center	\$25,000	Majority funding of advanced eye

Feed By Grace	\$17,000	examination equipment
The Charis Project	\$15,000	Fences and earthworms for gardens
		Creation of orphanage community and farms in rural Thailand
Against Malaria	\$9,000	15,000 nets in Africa
Northside Inter-Community Agency	\$6,000	Literacy program for developing readers

## 2011

Hope Farm	\$15,000	One-year of private education for 8 boys
The Warm Place	\$3,750	Training for 25 additional counselors
Fortress Youth Development Center	\$1,250	Literacy software for developing readers

## ■ 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:

94-100 = A	73-76.999 = C
90-93.999 = A-	70-72.999 = C-
87-89.999 = B+	67-69.999 = D+
83-86.999 = B	63-66.999 = D
80-82.999 = B-	60-62.999 = D-
77-79.999 = C+	Below 60 = F

Personal Statement on Philanthropic interests .....	5%
White Paper Evaluations of 5-6 Initial Charities .....	15%
Briefing documents: Top 50 Charities .....	10%
Group Briefings and Presentations: Top 15 Charities .....	20%
<i>10% for the group as a whole and 10% your own component of the group work)</i>	
Online Response Work.....	20%
One-page reflections and responses on process and learning .....	20%
Final Personal Reflection and Letter to Donor .....	10%

## ■ Assignments

### Personal Statement on Philanthropic Interests:

A two-three page statement explaining what nonprofits appeal to you most and why. Please write this after taking your values test and Strengthquests test. (Individual)

### Initial White Papers:

One-page studies of your initial nonprofit entries. (Individual)

### Top 50 Briefing Documents:

Three-page studies of each organization. (Small Group/Individual).

### Group Briefings and Presentations:

Ten to fifteen page documents analyzing finalist organizations. These documents should reflect complete due diligence. The presentation is a 15 minute presentation using multimedia. (Large Group).

### Online Response Work

Weekly reactions to posts and reflections through the ecollege system. (Individual)

**One-page reflections and responses**

Periodic reflections on the process and articles. (Individual)

**Final Personal Reflection & Letter to Donor** (Individual)

■ **Tentative Schedule: 17 Weeks, 16 Meetings** (N.B.: I reserve the right to make changes)

Week	Class	Material Covered / Class Work	Work: Process and Due Dates
Week 1	<b>Tuesday, 14 Jan.</b>  <b>Introduction &amp; Building an SROI</b>	Introduction to Course Begin Developing SROI Alumni Speakers  <b>Readings:</b> 1. <i>The Art of Giving</i> 2. <i>Give \$mart</i>	
Week 2	<b>Tuesday, 21 Jan.</b>  <b>Working as a Team, Drafting an SROI, &amp; Understanding the Purpose of Giving</b>	The Case of Steve Jobs Complete SROI Draft Writing the White Paper Researching Non-profits for White Papers  <b>Readings:</b> 1. Andrew Carnegie’s “Gospel of Wealth” excerpt 2. Bill Gates’ Harvard Commencement Speech 3. Preston, “Steve Jobs Found Much to Dislike About Philanthropy” 4. “A Brief History of Charitable Giving” 5. Michael Norton: How to buy happiness (Video) 6. Mark Bezos: “A Life Lesson from a Volunteer Firefighter” (Video) 7. Leonhardt, “What Makes People Give?” 8. Johnson, “Gospel of Wealth Fails ...” 9. Soros, “My Philanthropy”	1. Post Strengthquests 2. Post Values Test Results 3. Turn in Personal Statement on Philanthropic interests.
Week 3	<b>Tuesday, 28 Jan.</b>	Strategic Philanthropy & Readings Assessing Gifts from 2012 & 2013 Online resources  <b>Readings:</b> 1. Brest & Harvey, chapters 1-4 in <i>Money Well Spent: A Strategic Plan for Smart Philanthropy</i> 2. Frumkin, Chapter 4 in <i>Strategic Giving: The Art and Science of Philanthropy</i> 3. Cummings, “Putting Charities to the Financial Test” — <i>The Wall Street</i>	1. Upload to E-College White 2. Papers on 5 organizations (one may be international) 3. One-page reflection

		<p><i>Journal</i></p> <ol style="list-style-type: none"> <li>4. Case Study <i>Don Williams' Effort to Empower South Dallas: Helping a Neighborhood Help Itself</i></li> <li>5. Christine Sherry: "Strategic Philanthropy for Beginners" (Video)</li> <li>6. Majora Carter: "3 Stories of Local Eco-entrepreneurship" (Video)</li> <li>7. "The Giving Pledge" (Video)</li> <li>8. Eli Broad on <i>60 Minutes</i> (Video)</li> <li>9. Reich, "A Failure of Philanthropy"</li> </ol>	
<p>Week 4</p>	<p><b>Tuesday, 4 Feb.</b></p>	<p>Debate and Narrow from 100 to 50 best charities that meet our SROI Assign charities for Top 50 Briefing Documents</p> <p><b>Readings:</b></p> <ol style="list-style-type: none"> <li>1. Read "Five Myths about Charitable Giving" – <i>The Washington Post</i></li> <li>2. White Papers</li> </ol>	<p>Comment on White papers through online threaded discussion</p> <p>Come to class with a detailed list of charities you want to support and charities you feel should be cut</p>
<p>Week 5</p>	<p><b>Tuesday, 11. Feb.</b></p>	<p>What does due diligence mean and look like? What goes into your briefing document?</p> <p><b>Readings:</b></p> <ol style="list-style-type: none"> <li>1. Brest &amp; Harvey, chapter 5 in <i>Money Well Spent</i></li> <li>2. Wallace, "Effort Aims to Steer Gifts to Nonprofits That Get Results"</li> <li>3. Salmon, "Donors Aren't Always Right. Here's How to Sidestep Their Misguided Ideas"</li> <li>4. Bernholz, "Philanthropy's 2012 Buzzwords"</li> <li>5. "Why Can't We Sell Charity Like We Sell Perfume?"</li> <li>6. Taylor Conroy: "How to Build a School in 3 Hours" (Video)</li> <li>7. "Due Diligence Done Well: Guide for Grantmakers"</li> </ol>	<p>Work in pairs to visit nonprofits and produce briefing documents</p> <p>One-page reflection</p>
<p>Week 6</p>	<p><b>Tuesday, 18 Feb.</b></p> <p><b>Researching the Top 50</b></p>	<p>Work in pairs to visit nonprofits and produce briefing documents</p> <p>Meet individually with RP on W-R-F</p> <p>No class meeting</p>	<p>Upload to E-College your briefing documents on the top 50 finalists (due Friday, 21 Feb. at noon)</p> <p>Online evaluation of nonprofits (threaded discussion)</p>
<p>Week 7</p>	<p><b>Tuesday, 25 Feb.</b></p>	<p>Debate and Narrow from 50 to 12 finalists</p> <p><b>Readings:</b></p>	<p>Online evaluation of nonprofits (threaded discussion)</p>

		<ol style="list-style-type: none"> <li>1. Brest &amp; Harvey, chapter 10 in <i>Money Well Spent: A Strategic Plan for Smart Philanthropy</i></li> <li>2. "What Do Nonprofits Stand for? Renewing the Nonprofit Value Commitment"</li> <li>3. "What Makes Nonprofits Special?"</li> </ol>	
Week 8	<b>Tuesday, 4 March</b>	<p>Debate and Narrow from 50 to 12 finalist charities</p> <p>Assign charities for finalist groups</p>	<p>Online evaluation of nonprofits (threaded discussion)</p> <p>One-page reflection</p>
Week 9	<b>Tuesday, 11 March</b>	<b>SPRING BREAK</b>	
Week 10	<b>Tuesday, 18 March</b>	<p>Discuss Due Diligence tailored to class needs</p> <p><b>Due Diligence &amp; Intensity</b></p> <p>Class expectations for reports &amp; presentations: What information do you want?</p> <p><b>Readings:</b></p> <ol style="list-style-type: none"> <li>1. Stannard-Stockton "Nonprofit Analysis: Beyond Metrics"</li> <li>2. Blum, "Bigger Staff and Bolder Goals Turn Around a Quiet Hunger-Fighting Charity"</li> <li>3. Blum, "Go Big or Go Home: Tips from Share Our Strength"</li> </ol>	<p>Work in Groups to Perform Site Visits and Produce Reports</p> <p>One-page reflection</p>
Week 11	<b>Tuesday, 25 March</b>	<p>Group Consultations with RP</p> <p>Work in Groups to Perform Site Visits, interview CEOs, and Produce Reports</p>	<p>Work in Groups to Perform Site Visits, interview CEOs, and Produce Reports</p> <p>Each Group is responsible for providing a formal report to professor about week's Activities</p> <p>One-page reflection</p>
Week 12	<b>Tuesday, 1 April</b>	<p>Group Consultations with RP</p> <p>Work in Groups to Perform Site Visits, interview CEOs, and Produce Reports</p>	<p>Work in Groups to Perform Site Visits, interview CEOs, and Produce Reports</p> <p>Each Group is responsible for providing a formal report to professor about week's Activities</p> <p>Briefing Document due online: Friday, 4 April @ 5 PM</p> <p>One-page reflection</p>

Week 13	<b>Tuesday, 8 April</b>	Group Presentations of Briefing Documents  Business Casual & Classy	Online evaluation of nonprofits (threaded discussion)
Week 14	<b>Tuesday, 15 April</b>	Group Presentations of Briefing Documents  Business Casual & Classy	Online evaluation of nonprofits (threaded discussion)  One-page reflection
Week 15	<b>Tuesday, 22 April</b>	Debates and Decision-Making  Business Casual & Classy	
Week 16	<b>Tuesday, 29 April</b>	Debates and Decision-Making  Business Casual & Classy  We will not leave class until final decisions—nonprofits and amounts—are made!	One-page reflection
Week 17	<b>Tuesday, 6 May</b>	<b>@ 5:00 :: AWARDS CEREMONY in Debate Chamber; more formal dress</b>	<b>Letter of reflection addressed to sponsor, due Wednesday, 7 May by 10 PM</b>

## ■ Basic Primer: Nonprofit Organizations in US

