

Honors Colloquium: Spring 2015



HCOL 40023: On Human Nature — Giving & Philanthropy

Section 680
Scharbauer Hall 1008
Thursday 5:00–7:00 PM

■ Course Information

Dr. Ron Pitcock
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Office Hours: Monday 10:00-12:00; Thursday 1-2; and by appointment

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The Philanthropy Lab

Web site: <https://www.thephilanthropylab.org>

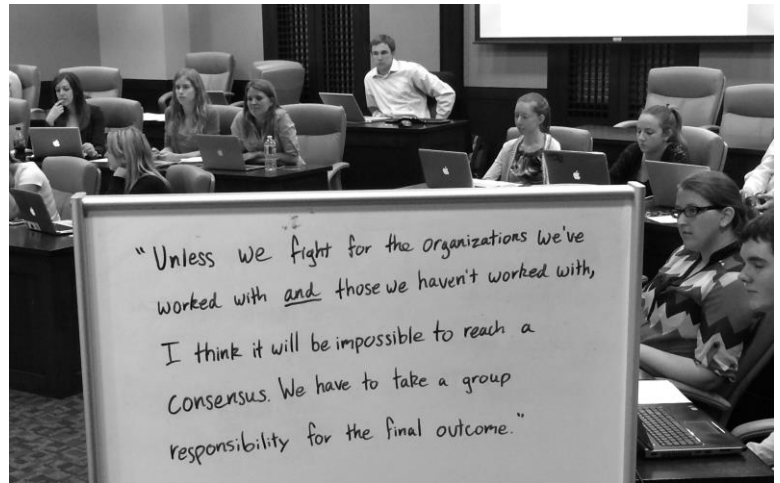
Facebook: <https://www.facebook.com/ThePhilanthropyLab>

Twitter: <https://twitter.com/ThePhilLab>

■ Overview

"Nature of Giving," an upper-division Honors colloquium, will concentrate on two primary learning outcomes.

First, students will gain an understanding and appreciation for the meaning/importance of philanthropy. Students will examine the scope and diversity of the philanthropic sector through historical figures like Andrew Carnegie and John D. Rockefeller and current philanthropists Warren Buffett and Bill Gates, who co-founded The Giving Pledge—a challenge directed toward the wealthy to give away a majority of their wealth to charitable causes. This work will introduce students from a range of disciplines to the complex roles various foundations currently play in US society and culture,



and encourage them to examine further the intersections of philanthropy with policy, the arts, business, law, and society.

Second, students will solve problems associated with philanthropy by participating in real philanthropic endeavors. Students will research various nonprofit organizations located in both Fort Worth and international locations, visit and conduct interviews, develop various memoranda/briefing 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 The Once Upon A Time Foundation... 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, UCLA, and Baylor. 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.thephilanthroplab.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 a 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 4-6 organizations will receive funds.

On Tuesday, May 5 at 5:30 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.
- 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.

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

— Winston S.
Churchill

■ 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.

Post work on E-Digication portfolio. We will use the online portfolio system as a place to document all the work that you have done. I will model this in class: this site should inform the final reflective paper for the course.

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.

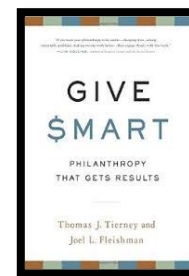
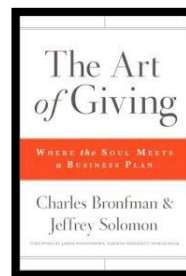
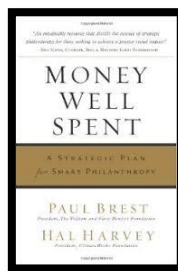
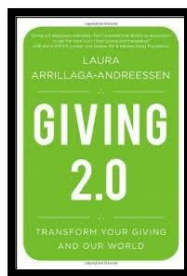
E-college: We will use the E-college learning platform extensively in this course. We will share all documents, have multiple threaded discussions, and track your grades on our class site.

Philanthropy Fridays: This speaker series will take place on 3-5 Fridays this semester. During these sessions, we will have a lunch and spend time with a speaker who will give a short presentation and answer questions regarding their work and thoughts on philanthropy, as well as your work in this class.

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

--Aristotle

■ Texts



Books

Arrillaga-Andreessen, Laura. *Giving 2.0: Transform Your Giving And Our World*. San Francisco: Jossey-Bass, 2012.

Brest, Paul and Hal Harvey. *Money Well Spent: A Strategic Plan for Smart Philanthropy*. New York: Bloomberg, 2008. (online selections)

Bronfman, Charles & Jeffrey Solomon. *The Art of Giving: Where the Soul Meets a Business Plan*. San Francisco: Jossey-Bass, 2010.

Tierney, Thomas J. and Joel Fleishman. *Give \$mart: Philanthropy That Gets Results*. New York: PublicAffairs, 2011.

Articles

- "America's Worst Charities." <http://www.tampabay.com/topics/specials/worst-charities.page>
- Bernholz, Lucy. "Philanthropy's 2012 Buzzwords." *The Chronicle of Philanthropy* 26 December 2012. (online)
- Blum, Debra. "Bigger Staff and Bolder Goals Turn Around a Quiet Hunger-Fighting Charity." *The Chronicle of Philanthropy* 2 December 2012. (online)
- . "Go Big or Go Home: Tips from Share Our Strength." *The Chronicle of Philanthropy* 2 December 2012. (online)
- Brief History of Charitable Giving. www.givingbetter.org (online)
- Carnegie, Andrew. *The Gospel of Wealth* (online)
- Cummings, Jennifer Hoyt. "Putting Charities to the Financial Test." *The Wall Street Journal* 28 November 2011. (online)
- "Due Diligence Done Well: A Guide for Guidemakers."
- Frumkin, Peter. *The Art and Science of Philanthropy*. Chicago: U of Chicago P,
- Johnson, Eric Michael. "The Gospel of Wealth Fails the Inequity Test in Primates." *Scientific American* (December 6, 2012).
- Leonhardt, David. "What Makes People Give?" 9 March 2008. *New York Times Magazine*. 2006. (online excerpt)
- Pallotta, Dan. "Why Can't We Sell Charity Like We Sell Perfume?" *The Wall Street Journal*. 14 September 2012. (online)
- Preston, Caroline. "Steve Jobs Found Much to Dislike About Philanthropy." *The Chronicle of Philanthropy* 26 October 2011. (online)
- Reich, Rob. "A Failure of Philanthropy: American Charity Shortchanges the Poor, and Public Policy is Partly to Blame."
- Soros, George. "My Philanthropy."
- Stern, Ken. "Five Myths About Charitable Giving." *The Washington Post*. (online)
- Salamon, Lester M. *The State of Nonprofit America*. 2nd 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)

Videos

- Bezos, Mark. "A Life Lesson from a Volunteer Firefighter." TED Talk. (online)
- "Eli Broad." *60 minutes*, 2011. (online)
- Carter, Majora. "3 Stories of Local Eco-entrepreneurship." TED Talk. (online)
- Conroy, Taylor. "How to Build a School in 3 Hours." TED Talk. (online)
- Dichter, Sasha. "The Generosity Experiment." TED Talk. (online)
- Fulton, Katherine. "You are the Future of Philanthropy." TED Talk. (online)
- Gates, Bill. Harvard University Commencement Speech, 2007. (online)
- "The Giving Pledge." ABCnews. (online)
- Norton, Michael. "How to Buy Happiness." TED Talk (online)
- Sherry, Christine. "Strategic Philanthropy for Beginners." Google Tech Talk. (online)

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

— Lao Tzu

■ 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)
- 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) : offers strategic services to philanthropists)
- American Institute of Philanthropy (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)

■ Past Gifts Made by Nature of Giving Alumni

2014

The Net	\$16,592	Development of the Purchased Program
Project Bliss	\$6,200	Furnishings for new client housing
Feed By Grace	\$9,313	Infrastructure Project
Battered Women's Foundation	\$12,895	Creation of Exterior Storage
Mission Arlington	\$15,000	New Bus

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 examination equipment
Feed By Grace	\$17,000	Fences and earthworms for gardens
The Charis Project	\$15,000	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

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 based on reflection and group evaluation)</i>	
Online Response Work.....	20%
One-page reflections and responses on process and learning	20%
Final Reflection Paper and Letter to Donor	15%

■ Assignments

All assignments (excluding online response work) should be included in your e-digication portfolio.

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 Strength quests test. (Individual)

Initial White Papers:

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

Top 40 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	Tuesday, 13 Jan.	Introduction to Course Begin Developing SROI Alumni Speakers	Pre-course survey
	Introduction & Building an SROI		
Week 2	Tuesday, 20 Jan.	The Case of Steve Jobs Complete SROI Draft Writing the White Paper Researching Non-profits for White Papers	1. Post Strengthquests 2. Post Values Test Results 3. One-page reflection: Personal Statement on Philanthropic interests.
	Working as a Team, Drafting an SROI, & Understanding the Purpose of Giving	Readings: 1. From <i>The Art of Giving</i> 2. From <i>Give \$mart</i> 3. From Giving 2.0 4. Andrew Carnegie's "Gospel of Wealth" excerpt 5. Bill Gates' Harvard Commencement Speech 6. Preston, "Steve Jobs Found Much to Dislike About Philanthropy" 7. "A Brief History of Charitable Giving" 8. Michael Norton: How to buy happiness (Video) 9. Mark Bezos: "A Life Lesson from a Volunteer Firefighter" (Video) 10. Leonhardt, "What Makes People Give?" 11. Johnson, "Gospel of Wealth Fails ..." 12. Soros, "My Philanthropy"	
Week 3	Tuesday, 27 Jan.	Guest Speaker: Lauren Wolters, Once Upon a Time Foundation...	1. Upload to E-College White Papers on 5 organizations (one may be international) 2. One-page reflection: Why you chose the five organizations.
		Strategic Philanthropy & Readings Assessing Gifts from 2012 & 2013 Online resources	
		Readings: 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>	

		<ol style="list-style-type: none"> 3. Cummings, "Putting Charities to the Financial Test" — <i>The Wall Street Journal</i> 4. Case Study <i>Don Williams' Effort to Empower South Dallas: Helping a Neighborhood Help Itself</i> 5. Christine Sherry: "Strategic Philanthropy for Beginners" (Video) 6. Majora Carter: "3 Stories of Local Eco-entrepreneurship" (Video) 7. "The Giving Pledge" (Video) 8. Eli Broad on <i>60 Minutes</i> (Video) 9. Reich, "A Failure of Philanthropy" 	
<p>Week 4</p>	<p>Tuesday, 3 Feb.</p>	<p>Debate and Narrow from 100 to 40 best charities that meet our SROI Assign charities for Top 50 Briefing Documents</p> <p>Readings:</p> <ol style="list-style-type: none"> 1. Read "Five Myths about Charitable Giving" – <i>The Washington Post</i> 2. White Papers 	<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>Tuesday, 10 Feb.</p>	<p>What does due diligence mean and look like? What goes into your briefing document?</p> <p>Readings:</p> <ol style="list-style-type: none"> 1. Brest & Harvey, chapter 5 in <i>Money Well Spent</i> 2. Wallace, "Effort Aims to Steer Gifts to Nonprofits That Get Results" 3. Salmon, "Donors Aren't Always Right. Here's How to Sidestep Their Misguided Ideas" 4. Bernholz, "Philanthropy's 2012 Buzzwords" 5. "Why Can't We Sell Charity Like We Sell Perfume?" 6. Taylor Conroy: "How to Build a School in 3 Hours" (Video) 7. "Due Diligence Done Well: Guide for Grantmakers" 	<p>Work in pairs to visit nonprofits and produce briefing documents</p> <p>One-page reflection on the cut from 100 to top 40.</p>
<p>Week 6</p>	<p>Tuesday, 17 Feb.</p> <p>Researching the Top 50</p>	<p>In-class visit: Jeff & Kelly Dillard; Al Mueller (Excellence in Giving)</p> <p>Work in pairs to visit nonprofits and produce briefing documents</p> <p>Meet individually with RP on W-R-F</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>Tuesday,</p>	<p>Debate and Narrow from 50 to 12</p>	<p>Online evaluation of nonprofits</p>

	24 Feb.	finalists Readings: 1. Brest & Harvey, chapter 10 in <i>Money Well Spent: A Strategic Plan for Smart Philanthropy</i> 2. "What Do Nonprofits Stand for? Renewing the Nonprofit Value Commitment" 3. "What Makes Nonprofits Special?"	(threaded discussion)
Week 8	Tuesday, 3 March	Debate and Narrow from 50 to 12 finalist charities Assign charities for finalist groups	Online evaluation of nonprofits (threaded discussion) One-page reflection: Cut to 12
Week 9	Tuesday, 10 March	SPRING BREAK	
Week 10	Tuesday, 17 March	In-class visit: John Robinson, Amon Carter Foundation Due Diligence & Intensity Discuss Due Diligence tailored to class needs Class expectations for reports & presentations: What information do you want? Readings: 1. Stannard-Stockton "Nonprofit Analysis: Beyond Metrics" 2. Blum, "Bigger Staff and Bolder Goals Turn Around a Quiet Hunger-Fighting Charity" 3. Blum, "Go Big or Go Home: Tips from Share Our Strength"	Work in Groups to Perform Site Visits and Produce Reports One-page reflection: Evaluation of Group members (Due Friday morning @8)
Week 11	Tuesday, 24 March	In-class visit: Neils Agathar, Burnett Foundation Group Consultations with RP Work in Groups to Perform Site Visits, interview CEOs, and Produce Reports	Work in Groups to Perform Site Visits, interview CEOs, and Produce Reports Each Group is responsible for providing a formal report to professor about week's Activities One-page reflection: Evaluation of Group members (Due Friday morning @8)
Week 12	Tuesday, 31 March	In-class visit: Geoffrey Raynor, Once Upon A Time Foundation... Group Consultations with RP (Out of class)	Work in Groups to Perform Site Visits, interview CEOs, and Produce Reports Each Group is responsible for

		Work in Groups to Perform Site Visits, interview CEOs, and Produce Reports	<p>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: Comparison of two guest speaker visits—Dillards and Raynor</p>
Week 13	Tuesday, 7 April	Group Presentations of Briefing Documents	Online evaluation of nonprofits (threaded discussion)
		Business Casual & Classy	
Week 14	Tuesday, 14 April	Group Presentations of Briefing Documents	Online evaluation of nonprofits (threaded discussion)
		Business Casual & Classy	One-page reflection: Evaluation of Group members (Due Friday morning @8)
Week 15	Tuesday, 21 April	Debates and Decision-Making	
		Business Casual & Classy	
Week 16	Tuesday, 28 April	Debates and Decision-Making	One-page reflection: Response to first week of debates and planning for final night
		Business Casual & Classy	
		We will not leave class until final decisions—nonprofits and amounts—are made!	
Week 17	Tuesday, 5 May	@ 5:30 :: AWARDS CEREMONY more formal dress	<p>Final Reflection Paper Due by Friday of Finals Week</p> <p>Letter of reflection addressed to sponsor, due Wednesday, 6 May by 10 PM</p>

■ **Basic Primer: Nonprofit Organizations in US**

