



Civil Society & Community Studies

School of Human Ecology
Nancy Nicholas Hall
1300 Linden Drive
Madison, WI 53706

Philanthropy & Civic Engagement CSCS 400

Philanthropy Lab

Tuesday & Thursday, 1:00-2:15pm - 3 Credits

Cynthia Jasper PhD, Professor

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Acknowledgement

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Course Description

This class explores philanthropy and civic engagement through giving time, money and effort to a public purpose. Students will learn the philanthropic process including creating a giving plan, as well as exploring strategic and creative ways to give that promote civil society and engagement. Students will develop plans for assessment and evaluation of philanthropic giving.

Course Overview

This course explores philanthropy and civic engagement through giving time, money and effort to a public purpose. It includes the theory and structure of civil society, with special attention to the nonprofit sector. In addition to classroom learning, this course includes an exciting and unique experiential component. Over the course of a semester, students will decide on the distribution of real funds to support philanthropic goals through a philanthropy project. Students will learn the philanthropic process including creating a giving plan, as well as exploring strategic and creative ways to give that promote civil society and engagement. Students will develop plans for assessment and evaluation of giving including measurements of success that are indicators of impact.

Philanthropy has a long history of making a difference within our communities by taking private resources and developing them with a public purpose. More recently, philanthropic giving has become one of the largest trends in our society with *Giving USA* reporting in 2017, Americans gave over \$410.02 billion to the philanthropic sector. Although philanthropic endeavors tend to be defined through gifts of money and time, the sector extends far beyond in more creative ways including social entrepreneurship to achieve the goal of making the world a better place. With approximately 1.4 million charitable and religious organizations that aid in advocacy, human and social services, research, education, as well as many others, our communities are stronger due to the support of these philanthropic works (*Giving USA Foundation, 2018*).

This course will provide an in-depth understanding of philanthropy, including its historical development, and normative and structural elements as a driver of social change. Contemporary topics will include: ethics, future trends, women, diverse populations, and youth philanthropy, as well as corporate, international, and disaster relief philanthropy. By the end of the course, students will have knowledge of the history and structure of civil society, the tradition of competing value commitments in civil society, the modern nonprofit sector and its relationship to government and for-profit arenas, and key challenges facing nonprofit organizations related to philanthropic giving today nationally and globally. Ultimately, students will apply this knowledge to a practical exercise in philanthropic grant writing.

Philanthropy Project

The unique aspect of this course is a lab on philanthropy with a focus on grant development and donating in an effective manner. A special feature of this course will be an opportunity for students to apply theoretical knowledge to a real-world decision-making process by determining how to allocate \$50,000 in actual grant funds to nonprofit organizations. Students will learn how to formulate goals to give effectively and learn to assess whether the goals have been achieved.

Students will develop funding priorities starting with a general issue area, taking into account the field of Human Ecology: recognizing our values of personal and family well-being specifically as it relates to children, families, consumers and communities. In the process of choosing recipients, students will address several key questions:

- How should funds be distributed in a way that optimizes the benefits, meets goals and objectives, and are consistent with one's values?
- What is the basis of private philanthropic giving for the public good?
- To what extent do non-governmental organizations depend on philanthropic giving to operate and achieve goals domestically and globally?
- How should charitable dollars be distributed and what role do nonprofit organizations and philanthropic dollars play in a modern democracy?
- What are the appropriate criteria to be used to select grant recipients?
- How will you generate future funds to support this course in the future? What is the process of raising funds for future students?
- How do you assess the success of your giving in accomplishing objectives and goals?

Learning Outcomes

By the end of the course, students should be able to:

1. Critically analyze philanthropy issues from an ecological perspective.
2. Recognize the social responsibility of individuals within a larger community and reflect on the role of giving within civil society including corporate, international, and disaster relief philanthropy.
3. Identify multiple stakeholders and describe the possibilities, values, and limitations of philanthropic decisions.
4. Explore philanthropy trends: women, diverse populations, and youth philanthropy.
5. Implement a fundraising plan to sustain this course for future students.
6. Share fund allocation decisions using written, oral, and visual communication.

Required Textbook and Course Materials

1. Required book for all: Tracy Gary, *Inspired Philanthropy* (Jossey-Bass Books, 2008).
2. Required book for all: Ed. Paul Woodruff, *The Ethics of Giving: Philosophers' Perspectives on Philanthropy* (Oxford University Press, 2018).
3. Books for Class Presentation (you will be assigned one of these during class):
Edited by Incite! Women of Color Against Violence. *The revolution will not be funded: Beyond the non-profit industrial complex* (Duke University Press, 2017).
Goldseker, S., & Moody, M. P. *Generation impact: How next gen donors are revolutionizing giving*. (Wiley, 2017)
Ilchman, W. F., Katz, S., & Queen, E., *Philanthropy in the world's traditions*. (Indiana University Press, 1998).
Shaw-Hardy, S., Taylor, M., & Beaudoin-Schwartz, B., *Women and philanthropy boldly shaping a better world*. (Jossey-Bass, 2010)
Zunz, O. *Philanthropy in America: a History*. (Princeton University Press, 2012).
Harber, J. *The Business of Good: Social Entrepreneurship and the New Bottom*. (2016).
Yunnus, M. *Building Social Business, The New Kind of Capitalism*. (Public Affairs, 2010).
4. All other readings and course materials will be available electronically on Canvas.

Communication and Technology Policies

Communication: Please check our Canvas site throughout the semester, reviewing the "Home" section, and other pertinent sections (e.g., "Assignments", "Discussion", etc.). You are responsible for monitoring Canvas Inbox for relevant course materials throughout the semester.

Technology Policies: Please treat the classroom as you would a professional foundation board room. This means you should limit your laptop use to taking notes and relevant course work, and refrain from cell phone use. This is your chance to practice professional skills which will be essential in your future careers and community work.

Grading

Timely completion of assignments is an important part of professionalism. Points will be deducted for each day that an assignment is late unless you have obtained prior approval from the instructor or in the case of an unforeseen emergency. All assignments and course requirements will be evaluated using UW-Madison's grading scale (below).

Letter Grade	GPA Value	Final Points Grade	Final Percentage Grade
A (Excellent)	4.0	93-100 points	93-100%
AB (Intermediate Grade)	3.5	88-92.5 points	88-92.5%
B (Good)	3.0	83-87.5 points	83-87.5%
BC (Intermediate Grade)	2.5	78-82.5 points	78-82.5%
C (Fair)	2.0	70-77.5 points	70-77.5%
D (Poor)	1.0	60-69.5 points	60-69%
F (Failure)	0.0	0-59.5 points	<59.5%

Your final semester grade will be unweighted and determined with the course requirements below.

Class participation and attendance: 20 points

Ethics of Giving Discussion Posts: 15 points

\$10 Exercise: 5 points

Giving Goal: 5 points

Issue Area Report/Presentation: 10 points

Book Club Presentation: 10 Points

Book Club Fact Sheet: 10 Points

Inspiring Philanthropist Paper: 10 points

Reflective Essay: 15 points

Total Points Possible: 100 points

Course Requirements & Assignments

Attendance and Participation

As one student previously said, "This class is not a 'class', it is real life. It is teaching students how to grow up, gain responsibility, and make an impact in our communities". Through this course you are given a power that should not be taken lightly: the power to deeply impact real communities. In order to respect these communities, it is essential for you to take responsibility for maintaining a professional and engaged atmosphere in the classroom. In order to accomplish this, and to facilitate effective discussions and a team-based learning experience, attendance is mandatory, and all absences will be accounted for in your final participation grade. As part of your professional practice, please make sure to be on time to all class sessions and please do not leave the classroom during the class period. Leaving during the course time for any reason, other than a verifiable emergency, will reflect negatively on your participation grade for the day. This course also requires that you prepare and be actively engaged in class activities and you will be evaluated on the frequency and quality of your participation in group discussions and team work. At some

points in the semester you will be asked to prepare for specific class activities ahead of time, and your engagement in this work will weigh heavily on your participation grade.

Each student is allowed one unexcused absence. For any additional absences, your attendance grade will be lowered 5 points unless you provide written documentation of an acceptable reason such as:

- Religious observations
- University sponsored requirements (with appropriate documentation)
- A doctor's note verifying that you are unable or advised not to attend class
- Family death or an emergency

The Ethics of Giving Discussion Board Posts: See syllabus for due dates

Reflection is an important part of the learning process which allows you to apply new skills and draw connections between topics. To facilitate reflection, you will be required to respond to 5 discussion board prompts throughout the semester based on your readings of *The Ethics of Giving*. To receive full credit (3pts/post) for this assignment, you must:

- Post an original discussion board prompt on 5 of the 7 Chapters by 12pm (noon) the day before the class it is assigned.
- In ~150 words, summarize one of the arguments/perspectives in the chapter in your own words, and explain your position on the argument. You should defend this position with other readings, personal experiences, or other knowledge sources. Your post should exhibit careful thought and critical reasoning.

\$10 Exercise: Due Monday 9/17 at 12pm on Canvas

If you were given \$10 to “do something good” how would you choose to use it? In this activity, you will do just this and be given \$10 to use as a philanthropist in any way you choose. More detailed instructions will be disseminated in class.

Issue Area Report/Presentation: Due Thursday 9/20 in class

An important part of philanthropy is deciding where to direct your giving. This assignment will allow you to research and learn about different issues impacting individuals and communities. In assigned groups, you will research a general issue area and report your findings to the class. Keep in mind that other groups will be researching different topics, therefore, you are responsible for informing the class about this issue area. The goal of this assignment is to collectively consider different areas that you as philanthropists can address, and to use this information to determine the kind of focus you would like to take. Once all of the issue area research has been shared and considered, you will work together to decide the scope, focus and issues that your class would like to impact through giving. See **Appendix A** for more detailed instructions.

Inspiring Philanthropist Paper: Submit Philanthropist for approval by 10/16,
Paper Due Tuesday 11/8 @ 11:59pm on Canvas

The purpose of this assignment is to learn more about an inspiring philanthropist and to explore their lives and work. For this assignment, you should survey the work of several philanthropists and choose one that you connect with the most to research further. You may be drawn to their

personal experiences, their life journey, the values they express or the issue areas they address. We will ask you to share the philanthropist you chose and why at the awards ceremony, so spend some time deciding who you would like to choose. The philanthropist may be living or historical, but they should be someone who self-identified as a philanthropist and practiced strategic giving. You should submit the name of your identified philanthropist to the instructors for approval. The idea is to find someone who you can learn from and have as an inspirational figure and model of philanthropy. More detailed instructions will be disseminated in class. See **Appendix B** for more detailed instructions.

Giving Goals: Due Thursday 10/23 @ 11:59pm on Canvas

Your giving goal is designed to allow you to apply your learning about philanthropy to your own personal life. The giving goal serves to guide your giving in the future and should reflect your values and areas of interests. Sample Giving Goals can be found on the Philanthropy Lab website (<https://www.thephilanthropylab.org/givinggoal.aspx>). You should post your goal both to the Discussion Board and on the Philanthropy Lab website by the due date. More details can be found in the “Giving Goals” handout from the Philanthropy Lab.

Book Club (Presentation & Fact Sheet): Please see course schedule for assigned due dates.

Students will work in groups of 4-5 and will be assigned to read and report on one of the Book Club options to the rest of the class. Each group will be given 40 minutes to present key ideas and findings from the book and lead a class activity on key issues raised. Presentations should be both informative and engaging and provide space for dialogue as a class. Each individual student should also complete a 1-page “Fact Sheet” detailing the key takeaways from the book. See **Appendix C** for more detailed instructions.

Final Reflective Essay: Due during the Final Exam **December 15 12:25pm -2:25pm @ Canvas**

You will complete a final Reflective Essay which will center on your experience and learning in this course. Your essay will be due as an attachment on Canvas during the Final Exam time, more detailed instructions and an essay prompt will be disseminated 2 weeks prior to the due date.

Course Policies

UW-Madison Credit Hour Policy

This class meets for two 75-minute class periods each week over the fall semester and carries the expectation that students will work on course learning activities (reading, writing, board work, etc.) for about 3 hours out of the classroom for every class period.

Rules, Rights and Responsibilities

See the Undergraduate Guide to [Rules, Rights and Responsibilities](#), outlining Student Privacy Rights, Availability of Academic Record Information to Parents or Guardians or Others, Student Rights and Responsibilities, Student Grievance Procedures, Seeking Assistance and AlcoholEdu.

Academic Integrity

By enrolling in this course, each student assumes the responsibilities of an active participant in UW-Madison's community of scholars in which everyone's academic work and behavior are held to the highest academic integrity standards. Academic misconduct compromises the integrity of the university. Cheating, fabrication, plagiarism, unauthorized collaboration, and helping others commit these acts are examples of academic misconduct, which can result in disciplinary action. This includes but is not limited to failure on the assignment/course, disciplinary probation, or suspension. Substantial or repeated cases of misconduct will be forwarded to the Office of Student Conduct & Community Standards for additional review. For more information, refer to the [student conduct website](#).

Special Accommodations

I support the right of all enrolled students to a full and equal educational opportunity. The Americans with Disabilities Act (ADA), Wisconsin State Statute (36.12), and UW-Madison policy (Faculty Document 1071) require that students with disabilities be reasonably accommodated in instruction and campus life. Reasonable accommodations for students with disabilities is a shared faculty and student responsibility. Students are expected to inform me of their need for instructional accommodations by the end of the third week of the semester, or as soon as possible after a disability has been incurred or recognized. I will work either directly with you or in coordination with the McBurney Center to identify and provide reasonable instructional accommodations. Disability information, including instructional accommodations as part of a student's educational record, is confidential and protected under FERPA.

Statement on Accommodation for Students' Religious Observances

According to campus-wide policy on religious observance, I invite you to notify me within the first three weeks of class of the specific dates for which you request relief for religious observance, since these may affect your ability to meet course deadlines.

Diversity & Inclusion

Diversity is a source of strength, creativity, and innovation for UW-Madison. We value the contributions of each person and respect the profound ways their identity, culture, background, experience, status, abilities, and opinion enrich the university community. We commit ourselves to the pursuit of excellence in teaching, research, outreach, and diversity as inextricably linked goals.

The University of Wisconsin-Madison fulfills its public mission by creating a welcoming and inclusive community for people from every background – people who as students, faculty, and staff serve Wisconsin and the world." <https://diversity.wisc.edu/>

Learning Activities

These key learning activities will supplement readings, discussions and lectures in ways that allow students to enrich their understandings of the possibilities of philanthropy.

Guest Speakers: The experiences of guest speakers will broaden students' understandings of philanthropy, professional opportunities, and the realities of both giving and receiving.

Films: These films provide students with insights into the history and contemporary practices of philanthropic endeavors from a variety of perspectives and will be shown as time allows.

- "American Experience" PBS: Three films from the collection will be shown to highlight the history, key players and past successes of philanthropy.
 - *The Great Famine*: "Sets a riveting story of American engagement with a distant and desperate people--an engagement hailed for its efficiency, grit and generosity"
 - *A Shot to Save the World*: "Reveals the dramatic story behind one of the greatest feats of medical science, the development of the first polio vaccine. It is an extraordinary story that spotlights one of the most remarkable examples of how much can be achieved when a nation—and a world— pulls together to defeat a common enemy.
- "New Heroes" PBS: The New Heroes tells the dramatic stories of fourteen daring social entrepreneurs who are undaunted by the chronic challenges of poverty, illness, unemployment, violence and ignorance they see in the world around them."
- Recommended Films: *Poverty Inc.*: "Follows the butterfly effect of our most well-intentioned efforts and pulls back the curtain on the poverty industrial complex. Are we catalyzing development or are we propagating a system in which the poor stay poor while the rich get hipper?"; *Who Cares?* "Anyone can be a change maker, regardless of leadership or marketable skills. It starts with having a vision for society while seeking accomplishment in one's life through contributions to improving the lives of others"; *Henry Ford*: "Paints a fascinating portrait of a farm boy who rose from obscurity to become the most influential American innovator of the 20th century. His fortune is still a part of one of the preeminent foundations in the United States which often leads the way in giving."

Philanthropy Exhibits: Students will visit exhibits and meet with curators to learn more about the connections between philanthropy, the arts and social issues.

- *Design Gallery*: School Human Ecology Fall 2018 Exhibit
- Recommended online exhibits:
 - *The Memory Project - Face of Joy*: <https://memoryproject.org>
 - *Stitching History from the Holocaust*: <http://stitchinghistory.org>

Site Visits: Students will conduct site visits with selected organizations and meet with nonprofit professionals to better evaluate proposals and building relationships.

Awards Ceremony: On **December 6, 2017 at 1:30pm**, students will host a formal awards ceremony for grant awardees at the university. The ceremony will be attended by school administrators at SOHE as well as key leadership at UW Madison.

Class Schedule and Readings

Tuesdays & Thursdays

1pm – 2:15pm

NNH ROOM 1125

Grant Making Timeline:**

September 11: Issue Area Groups Assigned

September 18: Committees Assigned

September 20: Issue Area Presentations

October 2: RFP Released

October 22: Applications from Nonprofits Due

November 9-11: Site Visits scheduled this week outside of class

November 22: Funding Decision Reached

December 6, 1:30pm: Awards Ceremony (please invite Family and Friends)

Unit 1: The Social Meanings & Realities of Giving

In this unit, we will explore the social dynamics and impacts of philanthropic giving by analyzing the roots of philanthropy and its role and landscape in American society.

Week 1: Course Overview

In this session we will introduce the teaching team and the course. We will outline learning goals and expectations for the semester.

Thursday, September 6: Course Overview

- Assignments Due:
 - N/A
- Class Activity:
 - Pre-Survey
 - Introduce Instructors
 - Review Syllabus and Course Expectations
 - Personal Notecard completed
- Readings:
 - N/A

**We expect to closely follow this course schedule and timeline. However, due to the nature of this work, the timeline and schedule may be altered at the instructors' discretion.

Week 2: Philanthropy, Inequality & Power

By its very nature, philanthropy is intricately connected to issues of inequality and power in society, whether through the issues it addresses or the nature of those who give. This week, we explore these connections and the various mechanisms and impacts they have on philanthropic giving and society.

Tuesday, September 11: The Relationship

- Assignments Due:
 - N/A
- Class Activity:
 - Review grant cycle for Philanthropy Lab
 - Assign Issue Area Groups and review assignment details
 - Conversations and analysis of readings, be prepared to discuss
 - \$10 Exercise disseminated
 - Sign up for next class readings @ Canvas
- Readings:
 - Laskowsk, K. Philanthropy and Inequality: What's the Relationship? [LINK](#)
 - Maurrasse, D. (2016). Philanthropy and Inequality. [LINK](#)
 - Gumede, M. (2017). Philanthropy can reduce inequality. [LINK](#)
 - Bloland, H. (1991). Book Reviews: Charity Begins at Home: Generosity and Self-Interest Among the Philanthropic Elite, by Teresa Odendahl. New York: Basic Books, 1990. *Nonprofit and Voluntary Sector Quarterly*, 20(1), 113-118.

Thursday, September 13: The Impacts

- Assignments Due:
 - Work with issue area group to prepare presentation for next week
 - Bring in a discussion question for your assigned reading. These will be posed to your classmates in small groups and should address sections of the reading which you think would benefit from group discussion. **You should still read/listen to all articles, so you can participate in the discussion.**
- Class Activity:
 - Review and sign Philanthropy Lab Materials
 - Assign Book Club Groups and review assignment details
 - Conversations and analysis of readings, be prepared to discuss
 - Assign Committees (please review descriptions ahead of time)
- Readings:
 - Smith, A. (2016). "Introduction" in *The revolution will not be funded: beyond the non-profit industrial complex*.
 - Allard, S. W. (2016). Tackling Today's Poverty with Yesterday's Philanthropy. [LINK](#)
 - Reich, R. (2005). A Failure of Philanthropy (SSIR). [LINK](#)
 - Listen to: Act one ("Money for nothing and your cows for free") in *This American Life* 503: I Was Just Trying to Help. [LINK](#)
 - Longhurst, R. (2017). Changing philanthropy to challenge inequality. [LINK](#)

- Review Philanthropy Lab Materials on Canvas
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Week 3: Who Gives & Why

Who gives in the U.S. and why they give are not always intuitive. This week we explore the types of people who give, where they direct their giving, and the role our values play in philanthropy.

Tuesday, September 18: Landscape of giving & values

- Assignments Due:
 - Complete Activities in the book by Gary Chapter 2 and bring to class (you will not turn these in, but you will need them for the class activity)
 - Bring 3 Questions for last year's students
 - **\$10 Activity post due by 12pm on Wednesday**
- Class Activity:
 - Conversations and analysis of readings, be prepared to discuss
 - Defining Personal and collective values
 - Report on \$10 Activity
 - Q & A with past students
- Readings:
 - Andrew Carnegie, "The Gospel of Wealth" (New York: St. Martin's Press, 1995).
 - Lynne, E., & Wisley, S. (2006). "Four Traditions of Philanthropy - Civic Reflection" in *The Civically Engaged Reader*, ed. A. Davis, E. Lynn, Great Books Foundation. [LINK](#)
 - Singer, P. (2006, December 17). What Should a Billionaire Give – and What Should You? [LINK](#)
 - Review 2018 Giving USA Report: [LINK](#)
 - Tracy Gary, Inspired Philanthropy, Introduction
 - Tracy Gary, Inspired Philanthropy, Chapter 1: Giving and the Nonprofit World
 - Tracy Gary, Chapter 2: You, the Philanthropist: **Complete exercises**

Thursday, September 20: Issue Area Presentations

- Assignments Due:
 - **Group Issue Area Presentation**
 - Class Activity:
 - Each group will present for 8-10 minutes on their issue area with 3-5 minutes for Questions & Answers, please be aware of your time use.
 - Pass out Gallery Walk worksheet
 - Readings:
 - N/A, prepare presentations
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Unit 2: Contemporary Approaches to Philanthropy

There are a variety of different approaches and philosophies towards philanthropic giving. In this unit we will explore these approaches and their impacts on decision making and funding. We will also actively be applying what we learn to our own grant making process.

Week 4: Setting Priorities and Making Decisions

This week we will begin the hard work of applying what we have learned to making the tough decisions of philanthropic giving and determine a focus, mission and giving plan for the semester.

Tuesday, September 25: Defining the Purpose & Mission

- Assignments Due:
 - Reflect on presentations from last week and think about narrowing down a focus
 - Complete Gallery Walk sheet and **bring to class**
- Class Activity:
 - Gallery Walk
 - Discuss and select focus area, form of giving, and number/size of grants
- Readings:
 - Tracy Gary, *Inspired Philanthropy*, Chapter 3: Developing your System of Giving
 - Tracy Gary, *Inspired Philanthropy*, Chapter 4: Creating a Mission Statement
 - Tracy Gary, *Inspired Philanthropy*, Chapter 5: Deciding How Much to Give
 - Tracy Gary, *Inspired Philanthropy*, Chapter 6: "Where to Give"

Thursday September 27: Philanthropy Lab Workshop

- Assignments Due:
 - Determined by committee as needed to accomplish goals
 - Class Activity:
 - Work in groups on Philanthropy Lab Tasks (see Committee Goals List)
 - Representatives from each committee schedule Office Hours w/ Morgan
 - **Reminder: Release RFP by 10/2**
 - Readings:
 - Kania & Kramer (2011). "Collective Impact" [LINK](#)
 - Meiksins, (2013). "Strategic Philanthropy: The good, the bad, the ugly" [LINK](#)
 - LCC Toolkit, "Evaluating Grants" [LINK](#)
 - National Archives. "Grant Evaluation Checklist" [LINK](#)
 - Tracy Gary, *Inspired Philanthropy*, Review pages 94-95
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Week 5: Setting Priorities and Making Decisions, Cont.

This week we continue working on grant making and preparing for the grant evaluation processes.

Tuesday, October 2: Philanthropy Lab Workshop

- Assignments Due:
 - Determined by committee as needed to accomplish goals
 - Evaluation & Grant Review Committees, prepare to share process plans **next class**.
 - **Ethics of Philanthropy Discussion Post Chapter 1 due by 12pm on Monday**
- Class Activity: **Release RFP by end of day**
 - Work in groups on Philanthropy Lab Tasks (see Committee Goals List)
- Readings:
 - Woodruff, *Ethics of Philanthropy*, Chapter 1

Thursday October 4: Evaluating and Assessing Grants

- Assignments Due:
 - **Reminder: Book Club Presentations begin next week**
 - **Ethics of Philanthropy Discussion Post Chapter 2 due by 12pm on Wednesday**
 - Class Activity:
 - Conversations of readings, be prepared to apply to Evaluation planning
 - **Evaluation & Dallas Conference Committee: Present process and plans**
 - **Grant Review Committee: Present process and plans**
 - Readings:
 - Woodruff, *Ethics of Philanthropy*, Chapter 2
 - La Piana Consulting, "Due Diligence Done Well: a Guide for Grantmakers." [LINK](#)
 - Indie Philanthropy Initiative, "Community-Based Decision Making" [LINK](#)
 - Buchanan (2011). "Passion needed for data driven analysis in Philanthropy" [LINK](#)
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Unit 3: Key Moments & History of Philanthropy in the U.S.

Understanding the history of philanthropy allows us to better and more fully understand its function and role in society today. In this unit we will explore this history broadly as well as key moments and figures in philanthropy in the U.S.

Week 6:

Tuesday October 9: Key Players and History of U.S. Philanthropy

- Assignments Due:
 - **Ethics of Philanthropy Discussion Post Chapter 3 due by 12pm on Monday**
- Class Activity:
 - **Book Club Presentation: 1**
 - **Book Club Presentations: 2**
- Readings:
 - Explore the Nonprofit Trust History of Giving Timeline: [LINK](#)
 - Woodruff, *Ethics of Philanthropy*, Chapter 3

Thursday, October 11: Excellence and Successes in Philanthropy

- Assignments Due:
 - **Reminder: submit your Inspiring Philanthropist for approval next week**
 - **Ethics of Philanthropy Discussion Post Chapter 4 due by 12pm on Wednesday**
 - Class Activity:
 - Film: Shot to Save the World, Smithsonian Channel [LINK](#)
 - Ethics Moment
 - Assign Readings for next week and Jigsaw activity
 - Readings:
 - Kane (2016), "Polio win is result of historic alliance": [LINK](#)
 - Woodruff, *Ethics of Philanthropy*, Chapter 4
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Unit 4: Types and Forms of Philanthropic Giving

In this unit we will focus on some of the different types and contexts for philanthropic giving. We will also explore our personal goals and plans as it related to giving.

Week 7:

This week, you will become the teachers. For this class activity, you will be assigned to one of four groups outlined below. You will be responsible for reading all of the articles in your topic. In class, you will be the expert and will be placed in small groups with students who did not read the same material as you. You will be responsible for teaching your topic to the other students in your group.

Tuesday 10/16: Social Entrepreneurship, International, Corporate & Venture Philanthropy

- Assignments Due:
 - Prepare to share synthesis of readings with group and lead discussion, you are not responsible for reading the articles of topic groups not assigned to you.
 - **Submit your Inspiring Philanthropist for approval as assignment note @ Canvas**
- Class Activity:
 - Jigsaw activity on readings
- Readings: Specific Readings based on Jigsaw Assignment
 - Social Entrepreneurship:
 - Alto (2013). "Entrepreneurial Philanthropy" [LINK](#)
 - Philanthropists and Social Entrepreneurs Collaborating for Innovation: [LINK](#)
 - Callahan, "Is too much funding going to Social Entrepreneurship – and not enough to Social Movements?" [LINK](#)
 - Explore Ashoka website and examples of social entrepreneurship [LINK](#)
 - International Philanthropy:
 - Alliance, "Defining Global Philanthropy" [LINK](#)
 - Maurrasse (2016), "Global Philanthropy and Inequality" [LINK](#)
 - Moreno (2015), "Ten trends in International Philanthropy" [LINK](#)
 - Ulmer (n.d.), "International Philanthropy" [LINK](#)

- Corporate Philanthropy:
 - Bishop and Green, (2015), “Philanthrocapitalism Rising” [LINK](#)
 - Edwards, “Why Business Won’t Save the World” [LINK](#)
 - Porter: Why Business Can Be Good at Solving Problems” [LINK](#)
- Impact Investing & Venture Philanthropy
 - Deshpande (2017), “Required Reading for aspiring Venture Capitalists” (review article and links throughout): [LINK](#)
 - Maskowitz (2017), “Impact Investing vs. Venture Philanthropy”, [LINK](#)
 - Jacobson (2013), “Has Venture Philanthropy Passed Its Peak”, [LINK](#)

Thursday 10/18: Personal Giving

- Assignments Due:
 - **Reminder: Giving Goals due next week**
 - **Ethics of Philanthropy Discussion Post Chapter 5 due by 12pm on Wednesday**
 - Class Activity:
 - **Book Club Presentation: 3**
 - **Book Club Presentations: 4**
 - Readings:
 - Woodruff, *Ethics of Philanthropy*, Chapter 5
 - Tracy Gary, *Inspired Philanthropy*, Chapter 7: Creating a Personal Giving Plan
 - Tracy Gary, *Inspired Philanthropy*, Chapter 8: The Many Ways to Give
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Unit 5: Grant Making, Evaluation & Engaging with Organizations

In this unit we will be focusing on processes of grant making once applications have been received. We will be making important funding decisions and considering the mechanisms and approaches that can be applied to evaluating proposals and engaging with organizations.

Week 8: Evaluating Grants & Conducting Site Visits

Tuesday, October 23: Philanthropy Lab Work Session

- Assignments Due:
 - **Giving Goals Due @ 11:59pm to Canvas, include screenshot of online submission**
 - **Ethics of Philanthropy Discussion Post Chapter 6 due by 12pm on Monday**
- Class Activity:
 - **Book Club Presentation: 5**
 - **Proposals due from organizations 10/22**
Grant Review Committee: Assign tasks for review
 - **Site Visit Committee: Present process and plans**
- Readings:
 - Woodruff, *Ethics of Philanthropy*, Chapter 6
 - Gary, *Inspired Philanthropy*, Chapter 10 Engagement with Groups you Support
 - Tiernan (2012). “Grant Management” [LINK](#)

- Alarie-Leca (2015), “Smarter Site Visits” [LINK](#)
- Review readings from September 29 Class

Thursday October 25: Philanthropy Lab Work Session

- Assignments Due:
 - Evaluate grants as determined by the class
 - **Ethics of Philanthropy Discussion Post Chapter 7 due by 12pm on Wednesday**
 - Class Activity:
 - Initial review of submitted proposals
 - Readings:
 - Submitted proposals as determined by the class
 - Woodruff, *Ethics of Philanthropy*, Chapter 7
-

Week 9: Evaluating Grants & Conducting Site Visits, Cont.

Tuesday 10/30: Philanthropy Lab Work Session

- Assignments Due:
 - Continue evaluating grants as determined by the class
- Class Activity:
 - Continued review of submitted proposals
 - Plans for site visits determined and scheduled
- Readings:
 - Submitted proposals as determined by the class

Thursday 11/1: Philanthropy Lab Work Session

- Assignments Due:
 - Continue evaluating grants as determined by the class
 - **Reminder: Inspiring Philanthropist Paper due next week**
 - Class Activity:
 - Continued review of submitted proposals
 - Prepare for site visits/phone conferences
 - Discuss chosen organizations
 - Readings:
 - Submitted proposals as determined by the class
-

Week 10: Evaluating Grants & Conducting Site Visits, Cont.

Tuesday 11/ 6: Philanthropy Lab Work Session

- Assignments Due:
 - Continue evaluating grants as determined by the class
- Class Activity:
 - Continued review of submitted proposals
 - Prepare for site visits/phone conferences
 - Discuss chosen organizations
 - Discuss site visits if completed

- Readings: As determined by class

Thursday 11/ 8: Philanthropy Lab Work Session

- Assignments Due:
 - Continue evaluating grants as determined by the class
 - **Inspiring Philanthropist Paper Due on Canvas by 11:59pm**
 - Class Activity:
 - Continued review of submitted proposals
 - Conduct site visits/phone conferences and discuss chosen organizations
 - Discuss site visits if completed
 - Readings:
 - As determined by class
-

Week 11: Evaluating Grants & Conducting Site Visits

Tuesday 11/ 13: Philanthropy Lab Work Session

- Assignments Due:
 - Continue evaluating grants as determined by the class
- Class Activity:
 - Report on findings from Site Visits
 - Continue decisions making process on proposals
- Readings:
 - As determined by class

Tuesday 11/ 13: Philanthropy Lab Work Session

- Assignments Due:
 - Continue evaluating grants as determined by the class
 - Class Activity:
 - Report on findings from Site Visits
 - Continue decisions making process on proposals
 - Readings:
 - As determined by class
-

Week 12: Evaluating Grants & Conducting Site Visits

Tuesday 11/ 20: Grant Decision Reached

- Assignments Due:
 - Continue evaluating grants as determined by the class
- Class Activity:
 - **Make final funding decisions**
 - **Class members call grant recipients and send email notifications**
- Readings:
 - As determined by class

Thursday 11/22 No Class, Thanksgiving

Week 13:

Tuesday November 27: Arts & Culture Philanthropy

12pm-1pm, 2017 Cohort Evaluation Presentation

- Assignments Due:
 - N/A
- Class Activity:
 - Guest Speaker, SoHE Design Gallery
- Readings: TBA Based on Gallery Exhibit

Thursday 11/29: Prep and finalize Awards Ceremony

- Assignments Due:
 - Preparations for Awards Ceremony
 - Class Activity:
 - Prepare for Awards ceremony
 - Confirm attendance from NGOs and make final arrangements
 - Readings: N/A
-

Week 14: Prepare for Awards Ceremony

Tuesday 12/4: Dress Rehearsal Awards Ceremony

- Assignments Due:
 - Preparations for Awards Ceremony
- Class Activity:
 - Conduct run through for Awards Ceremony – Dress Rehearsal
- Readings: N/A

Thursday 12/6: Awards Ceremony

- Assignments Due: N/A
 - Class Activity:
 - Attend and conduct awards ceremony
 - Arrive at 1pm (or earlier) to prepare for ceremony at 1:30pm
 - Attend reception following ceremony
 - Readings: N/A
-

Week 15: Final Class

Tuesday 12/11:

- Assignments Due: N/A
- Class Activity:
 - Reflection on process, Final Thoughts
 - Finalize post-grant evaluation process
 - Course Evaluation
- Readings: N/A

December 15, 12:25pm -2:25pm

Final Reflection Essay Due during exam period

Appendix A

Issue Area Presentations

An important aspect of philanthropy is deciding which issues and areas to direct your giving. This assignment will allow you to research and learn about different issues impacting individuals and communities. In your assigned groups, you will research a general issue area and report your findings to the class. Keep in mind that other groups will be researching different topics, therefore, you are responsible for informing the class about your assigned issue area and serving as the “experts” on this topic. The goal of this assignment is to collectively consider different areas that you as philanthropists can address, and to use this information to determine where you will focus your giving. Once all of the issue area research has been shared and considered, you will work together to decide the scope, focus and issues that your class would like to impact through giving.

Presentation: Due September 20

Prepare and deliver a 10-minute presentation to the group. Be sure to cover all of the following themes in the presentation. How you chose to convey this information and present is up to your group, but all group members should participate in some way.

- General statement of problem
- Populations impacted
- Local impact (city, county, state)
- National/International Impact
- Types of Solutions currently being used
- Organizations working in the area (local, regional, national, etc.)
- Your recommendations to the board (is this an issue that you can collectively address and should consider as a focus for funding?)
- Other information you think is important in deciding how to narrow the groups focus.
- It would be helpful to provide a short Fact Sheet or reference guide for the class
- Be prepared to answer questions about your issue from other groups.

Assessment Criteria:

Presentation will be evaluated as a group based on adherence to general presentation guidelines (e.g., formality, time limit, handout, speaking from outline instead of notes), clarity, and grasp of the material. Each member of the group should actively participate in the preparation and presentation of materials.

Appendix B

Inspiring Philanthropist Paper

The purpose of this assignment is to learn more about an inspiring philanthropist and to explore their lives and work. For this assignment, you should survey the work of several philanthropists and choose one that you connect with the most to research further. You may be drawn to their personal experiences, their life journey, the values they express or the issue areas they address. We will ask you to share the philanthropist you chose and why you chose them at the awards ceremony, so spend some time deciding who you would like to research. The philanthropist may be living or historical, but they should be someone who self-identified as a philanthropist and practiced strategic giving. If there is someone you know personally who fits these requirements, you may identify them as your inspiring philanthropist. Whenever possible, we encourage you to reach out to your chosen philanthropist and speak with them directly about their giving and views on philanthropy. The idea is to find someone who you can learn from and have as an inspiration figure and model of philanthropy.

You must submit your Inspiring Philanthropist to us by October 16 for approval.

Once you have chosen a philanthropist to research and they have been approved, you should write a 2-page single space essay which addresses the following questions:

- Biographical information that impacted their philanthropy, historical context
- Issue areas they have focused on through their philanthropy
- Notable achievements
- Why you chose this philanthropist
- How their life/work might impact your own giving, and what you learned from their approach that you can incorporate into your work in this class and beyond.

Assessment Criteria:

To receive full credit, your essay should address all topics covered in the assignment and the basic requirements outlined. It should be written following professional standards and should show quality in structure and style (remember to proofread!). Your essay should also show quality research and insight into the philanthropist activities and experiences. It should also draw clear connections between the philanthropist and your own values. Your essay should be submitted electronically in a Word document to Canvas on time.

Late submissions will only receive ½ of the available points.

Appendix C

Book Club Presentation and Fact Sheet

The purpose of this assignment is to broaden our understandings of philanthropy and explore specific topics in its history, application and social impacts. Since we do not have enough time in a semester to read all of these books individually, you will work collectively to read and teach the material to your peers. You will be assigned in groups to read and report on one of the Book Club selections described below. As a group you will read the book and report on the key findings, implications and arguments to the class.

Presentations: Group

You are the teachers and facilitators during the time, and your job is to teach an introduction to the book to your peers. Each member of the group should know the material well, you are the experts. Your group will have 40 minutes to present the material to the class in an engaging and informative manner. How you chose to present the material is up to your group, however, every member of the group should participate in equal ways to prepare and present the material. While the presentations will differ based on the style and structure of the books, you should address the following elements:

- Authors background, experience and credibility
- A clear statement of the book's central point
- An outline of the arguments made in the book and key supporting evidence
- Elements you found surprising or new
- Implications for the practice of philanthropy
- Your evaluation of the book: did it accomplish its purpose, do you have any critiques, would you recommend to another reader?

Your presentation should also provide space for **active engagement or discussion** with the material you present. So be sure to plan some kind of activity or discussion component with your presentation. You are the teachers, so engage and educate us.

Your presentation will be evaluated as a group based on adherence to general presentation guidelines (e.g., formality, time limit, handout, speaking from outline instead of notes), clarity, engagement with the audience, and grasp of the material.

Fact Sheet: Individual

Each individual should also prepare a 1-page Fact Sheet that summarizes the book. While you may consult with your group on this assignment, the Fact Sheet should be completed individually and submitted to Canvas before class on the day you present. The Fact Sheet should include:

- A concise summary of the book's main points
- A description of the style and structure of the book
- An evaluation of the book, including both strengths and weaknesses
- An analysis of how the book might inform our work in this class

Book Club Options (Final Choices will be made in class):

Philanthropy in America -A History, By Oliver Zunz

“American philanthropy today expands knowledge, champions social movements, defines active citizenship, influences policymaking, and addresses humanitarian crises. How did philanthropy become such a powerful and integral force in American society? Philanthropy in America is the first book to explore in depth the twentieth-century growth of this unique phenomenon. Ranging from the influential large-scale foundations established by tycoons such as John D. Rockefeller, Sr., and the mass mobilization of small donors by the Red Cross and March of Dimes, to the recent social advocacy of individuals like Bill Gates and George Soros, respected historian Olivier Zunz chronicles the tight connections between private giving and public affairs and shows how this union has enlarged democracy and shaped history. Demonstrating that America has cultivated and relied on philanthropy more than any other country, Philanthropy in America examines how giving for the betterment of all became embedded in the fabric of the nation’s civic democracy.”

Generation Impact, By Sharna Goldseker and Michael Moody

“The donors who sit at the apex of giving affect your life more than you might know. Whether Gen Xers or Millennials, America’s next generation of rising donors will have an outsized impact on the causes we all care about, eclipsing even those famous philanthropists who have come before. But who are these next gen donors? And how will they change big giving? Generation Impact puts you at the heart of today’s philanthropic revolution. Based on years of research and candid insights from the vanguard of next gen donors, this book offers a rare profile of the new face of philanthropy. You will get a look inside the “Impact Revolution” already under way in the world of giving and learn what this revolution means for all of us. Changing philanthropy in fundamental ways will be messy. But it could also result in solutions for some of our most persistent problems. Generation Impact offers targeted, practical advice to those who work closest with these next gen donors on how to engage, nurture, and encourage them as they reshape major giving, making their mark on history. Families, advisors, nonprofit professionals, and anyone who cares about a cause will learn how to help these rising donors channel their enthusiasm—and their wealth—to make the most positive difference in today’s world.”

Women in Philanthropy: Boldly Shaping a Better World, By Sondra Shaw-Hardy and Martha Taylor, with Buffy Beaudoin-Schwartz

“Women’s philanthropy has led the way in virtually reinventing the world of fundraising and ways of giving. When women make a gift, are in a leadership position, or volunteer their time to a nonprofit or charitable organization, they tend to base their efforts on solid principles such as compassion, values, vision, and responsibility. Women are increasingly engaged in giving circles, global giving, transformative gifts, entrepreneurial giving, faith-based giving, family and couple giving, and social change gifts. Based on extensive interviews and the authors’ combined half century of experience, Women and Philanthropy shares new ways to better engage women in giving, as well as insights into developing women leaders in the nonprofit arena, and advises women seeking to develop as philanthropic leaders and shape the future for the better. Women and Philanthropy explores women’s philanthropic endeavors, offering a wealth of information on key topics such as how and why women give, what it takes to develop a gender-sensitive fundraising program, how to develop a strategic plan to involve women as leaders and donors, and suggestions for working with women of wealth.”

The Revolution will not be Funded: Beyond the Nonprofit Industrial Complex, By Incite!

“A trillion-dollar industry, the US non-profit sector is one of the world’s largest economies. From art museums and university hospitals to think tanks and church charities, over 1.5 million organizations of staggering diversity share the tax-exempt 501(c)(3) designation, if little else. Many social justice organizations have joined this world, often blunting political goals to satisfy government and foundation mandates. But even as funding shrinks, many activists often find it difficult to imagine movement-building outside the non-profit model. The Revolution Will Not Be Funded gathers essays by radical activists, educators, and non-profit staff from around the globe who critically rethink the long-term consequences of what they call the “non-profit industrial complex.” Drawing on their own experiences, the contributors track the history of non-profits and provide strategies to transform and work outside them. Urgent and visionary, The Revolution Will Not Be Funded presents a biting critique of the quietly devastating role the non-profit industrial complex plays in managing dissent.”

Philanthropy in the World’s Traditions, By Warren Ilchman, Stanley Katz and Edward Queen

“Though voluntary association for the public good is often thought of as a peculiarly Western, even Christian conception, this book demonstrates that there are rich traditions of philanthropy in cultures throughout the world. Rather than search for expressions of Western conceptions of philanthropy, experts in area studies set forth to investigate how particular cultures understand philanthropy and its role in society, how people in these cultures attempt to realize “the good” through giving and serving. These essays study philanthropy in Buddhist, Islamic, Hindu, Jewish, and Native American religious traditions and in cultures from Latin America, Eastern Europe, the Middle East, Africa, India, South Asia, China, and Japan. Each essay describes a distinctive form of philanthropy in a given culture and historical period, its genesis, its functioning, and its relative importance within the culture and the culture’s predominant religious traditions.”

Building Social Business, The New Kind of Capitalism, Muhammad Yunus

“Muhammad Yunus, the practical visionary who pioneered microcredit and, with his Grameen Bank, won the 2006 Nobel Peace Prize, has developed a new dimension for capitalism which he calls “social business.” The social business model has been adopted by corporations, entrepreneurs, and social activists across the globe. Its goal is to create self-supporting, viable commercial enterprises that generate economic growth as they produce goods and services to fulfill human needs. In Building Social Business, Yunus shows how social business can be put into practice and explains why it holds the potential to redeem the failed promise of free-market enterprise.”

The Business of Good, by Jason Haber

“The Business of Good narrates the story behind social entrepreneurship as told by the individuals compelled to create a change in the world--not just another business. Serial and social entrepreneur Jason Haber intertwines case studies and anecdotes that show how social entrepreneurship is creating jobs, growing the economy, and ultimately changing the world. From Main Street to Wall Street, today’s social entrepreneurs are rebooting capitalism, challenging the charity industrial complex, and disrupting business models. Haber envelops the reader in the foundation of social entrepreneurship, from Benjamin Franklin to what he calls The Great Convergence, the turn-of-the-millennium zeitgeist shift which provided the fuel for social entrepreneurship’s surge to the forefront of business. Haber shares the stories of inspiring young people that are disrupting established norms and changing the world. This is a must read book for Millennials, business executives, nonprofits, doers, and dreamers--The Business of Good brings a much-needed fresh and innovative look at social entrepreneurship.”

Other Helpful Resources for Students

Local Websites:

United Way of Dane County <http://www.unitedwaydanecounty.org/>
United Way of Dane County – <https://www.unitedwaydanecounty.org/volunteer-center/>
Volunteer Your Time <http://volunteeryourtime.org/>
UW's Grant Information Collection <http://grants.library.wisc.edu/organizations/nonprofits.html>
Community Shares of Wisconsin www.communityshares.com
Madison Community Foundation www.madisoncommunityfoundation.org

National:

Alliance for Nonprofit Management <http://www.allianceonline.org/>
American Humanics <http://www.humanics.org/site/c.omL2KiN4LvH/b.1098773/k.BE7C/Home.htm>
Association for Research on Nonprofit Orgs and Voluntary Action <http://www.arnova.org>
Aspen Institute Nonprofit Sector Research Fund <https://www.aspeninstitute.org/programs/program-on-philanthropy>
Association of Fundraising Professionals <http://www.afpnet.org/>
Council on Foundations <http://www.cof.org/>
Foundation Center <http://foundationcenter.org/>
Guidestar www.guidestar.org
Independent Sector <http://www.independentsector.org/>
Nonprofit Academic Centers Council <http://www.nonprofit-academic-centers-council.org>
United Way of America <http://national.unitedway.org/>

Philanthropy Links

American Studies Association <http://www.theasa.net>
Association for Public Policy Analysis and Management <http://www.appam.org/>
The Center for Effective Philanthropy <http://www.effectivephilanthropy.org/>
Center for Lobbying in the Public Interest <http://www.clpi.org/>
Chronicle of Philanthropy <http://www.philanthropy.com/>
Giving USA Foundation <https://givingusa.org>
Joseph and Matthew Payton Philanthropic Studies Library (IUPUI) <http://www.ulib.iupui.edu/payton>
National Committee for Responsive Philanthropy <http://www.ncrp.org/>
Points of Light Foundation <http://www.pointsoflight.org/>
Philanthropy Journal <http://www.philanthropyjournal.com/>
The Philanthropy Roundtable <http://www.philanthropyroundtable.org/>

Resources for Nonprofit Organizations

Academy of Management <http://www.aomonline.org/>
BoardSource (formerly National Center for Nonprofit Boards) <http://www.boardsource.org/>
CharityChannel <http://www.charitychannel.com/>
Developing Human Resources in the Voluntary Sector <http://www.hrvs-rhsbc.ca/>
National Center on Nonprofit Enterprise <http://www.nationalcne.org/>
National Council of Nonprofit Associations <http://www.ncna.org/>
Nonprofit FAQ, Compiled by Putnam Barber <http://www.idealists.org/if/idealists/en/FAQ/NonprofitHome/default>
Nonprofit Information, Compiled by ARNOVA <http://www.arnova.org/nonprofitinformation/>
The Nonprofit Good Practice Guide <http://www.nonprofitbasics.org/>
The Nonprofit Quarterly <http://www.nonprofitquarterly.org/>

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