

OAM 499R

# Philanthropy Lab

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## Course Description and Objectives

This experimental course will introduce students to the role of philanthropy in solving public problems, particularly with regard to inequality and urban development in Atlanta. According to Bloomberg, Atlanta had the highest level of income disparity among U.S. cities in 2018.<sup>1</sup> Topics covered in the course will include the history and theory of philanthropic giving in the U.S. as well as recent research on strategic and venture philanthropy, particularly with regard to its relationship to the larger organizational ecosystem of urban communities. There is also a significant experiential component to the course: Teams will have the opportunity to make philanthropic grant investments (of up to \$50,000 in total plus additional incentives) to nonprofits in Clarkston, East Lake, and communities around the Southside of the Atlanta Beltline project. In this capacity, students will learn how to research, evaluate, and select nonprofits for investment, as well as how to measure and assess the impact of grant dollars on closing the income inequality gap.

## About Philanthropy Lab

This course will be taught in partnership with the [Philanthropy Lab](#). Based in Fort Worth, Texas, the Philanthropy Lab aims to expand student interest and participation in philanthropy. Since 2011, the Lab and its partners have given over \$8 million to 25 partner schools for classes on philanthropy. Each class receives up to \$110,000 to donate to local nonprofits, beginning with a class grant of \$50,000. In addition to the donations, students are also invited to write their own giving pledges to be posted on The Philanthropy Lab's website and evaluate prior gifts two years later. Alumni of each class are also invited to participate in an annual Ambassadors Conference. The Philanthropy Lab approved Emory's request to be a partner school for the 2019-2020 academic year.

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## Readings

We will read a mix of academic articles, book chapters, podcasts, and popular press pieces to develop a well-rounded but critical understanding of the intersection of philanthropy and inequality. *All readings must be completed prior to coming to class.* All readings are available online via links in the syllabus or Course Reserves. You will be responsible for everything in the readings, even if we don't talk about everything in class.

## Assignments

Assignments for this course include classroom participation, three short written assignments, and one team project. There are no exams in this class.

## Individual Components (60%)

### Participation (30 points or 15%)

Learning is a social process, and thus it is important for your education and the education of your fellow classmates that you come to class ready to think and engage. *Attendance alone does not count as active participation.* Students will be expected to participate in each session in a thoughtful, productive, and engaging manner by raising thought-provoking questions, listening attentively, sharing your own examples and experiences, and just generally making the classroom a vibrant, civil, and fun place to be for 75 minutes. Some of us are more introverted than others; if this includes you, please do not hesitate to make an appointment with the professors within the first few weeks of class to discuss other strategies for participation. *Just showing up or having more than two unexcused absences will result in a maximum of 16 points for class participation. Class participation will also incorporate team evaluations.*

### Discussion Leader (10 points or 5%) – Due Dates Vary

Working in groups of 2-3, everyone will be asked to lead one class discussion over the course of the semester. This will entail identifying one outside reading to present to the class and posting two discussion questions to Canvas the day before class.

### 10 Dollar Challenge & Philanthropic Profile (20 points or 10%) – Due January 27

On the first day of class you will be given 10 dollars to make whatever impact you wish. Reflecting on your 10 dollar experience, you will be asked to write your own philanthropic profile. What causes do you currently support, if any, and why? What philanthropic goals, such as volunteering, advocating, donating, or serving on a board, have you set for yourself, if any? Your 500-word reflection and profile should be uploaded to Canvas before class on January 27.

### One Position Paper (30 points or 15%) – Due Dates Vary

You will be asked to write one short position papers over the course of the semester. The purpose of each paper is for you to reflect on the course material and take a stand on a current philanthropic debate. Each 1,000-word paper should be uploaded to Canvas before class on the due date. More details on each paper will be given at least two weeks prior to their due date. You may choose from one of the following options.

- Position paper 1 – Due February 24 (Topic: Understanding the ecosystem)
- Position paper 2 – Due March 18 (Topic: Administrative costs)
- Position paper 3 – Due April 15 (Topic: Philanthropy and democracy)

### **Philanthropic Interview (30 points or 15%) – Due April 1**

Identify one philanthropic leader in your own life or at Emory and interview them about their philanthropic legacy. What motivated them to support a given cause? What impact do they hope to make through their giving, advocating, or volunteering? And how has their giving shaped the rest of their life, both personally and professionally? Your interview should be written in the style of a [New York Times Corner Office piece](#), providing a background of the interview subject and then a condensed version of your interview. Each student will declare their interviewee via [googledoc](#) list. More details will be given later in the semester. Your 1,000-word interview should be uploaded to Canvas before class on April 1.

### **Team Components (40%)**

The philanthropic investments in the class will be made through teams assigned to the Clarkston, East Lake, and Southside communities. Each team will act as its own foundation and will have up to \$7,500 to allocate to registered 501©3 organizations working in their assigned community. Each community will have two teams, meaning that up to \$15,000 can be donated to each community. Any additional bonus money from Philanthropy Lab incentives – up to \$35,000 – will be allocated through a class decision later in the semester. Teams will be assigned based on a leadership assessment and, when possible, stated preferences for assigned communities. Team will also be partnered with a community mentor to assist with site visits and a faculty lead. Roles on each team include:

- **Giving Philosophy Co-Leads (2)** – Tasked with leading the giving philosophy sprint and associated deliverables.
- **Site Visit Co-Leads (2)** – Tasked with working with the community mentor and faculty lead to arrange the community site visit and associated deliverables.
- **Investment Committee Rep (1)** – Each team will nominate one member to serve on the community investment committee, which will finalize each community’s grant recipients and amounts.
- **Team Historian / Philanthropy Lab Lead (1)** – Tasked with documenting the team’s work, including photographs and videos, as well as coordinating any Philanthropy Lab deliverables, such as nominations for the Ambassadors Summit and the submission of the Giving Pledges.

### **Team Charter (10 points or 5%) – Due February 3**

Leveraging the template provided on Canvas, each student team will complete a team charter that documents the strengths and skills of each team member (assets), different leadership styles represented within the group (based on Deloitte Business Chemistry assessment) along with rules and structure that will govern and inform the way you work, how you communicate, resolve differences, and make decisions.

### **Team Giving Philosophy (20 points or 10%) – Due February 12**

Matching the practices of successful foundations, each student team will prepare and present to the class a statement document that outlines their mission, values, priority focus areas, broad theory of change, along with any other qualification requirements related to potential grantees. Leverage template on Canvas.

### **Community Site Visit Report (20 points or 10%) – Due March 2**

Working closely with your assigned community coach, you will plan, execute, and summarize key learnings from your visit(s) to the community. Each team will complete a summary and present to class. Summaries will include more details on history of community, assets and challenges, key ecosystem insights, along with a short list of top stakeholders that your team will plan to engage as you finalize potential grantee nominations. Two student teams will be assigned to each community and should conduct a single, joint community visit experience in collaboration with your community coach. Leverage template on Canvas.

## **Funding Briefing Book (30 points or 15%) – Due April 6 (Draft) and April 27 (Final)**

Building on all of the previous team assignments completed earlier in the semester, each team will assemble a briefing book which summarizes their giving philosophy, nominated grantee candidates, funding decision rationale / rating, recommended funding amounts, and, if applicable, funding restrictions. The briefing document should be a professional summary of all related work, including any charts and photographs, that can be archived and shown to future classes. A presentation and draft of the briefing book will be due April 6 as part of your final giving decision. The final book will be due on April 27. Leverage template on Canvas.

### **Evaluation**

Grades for this course are based on the scheme outlined above. All assignments will be graded together by the faculty and the TA. The grades for this class will have an *anticipated* distribution according to the suggested guidelines of the BBA program office. Contact the professors if you have concerns about your grade as the semester progresses. *However, under no circumstance will grades be discussed after the final class.*

<u>Grade</u>	<u>Points</u>
A	186-200
A-	180-185
B+	174-179
B	165-173
B-	160-164
C+ or below	159 and below

### **Academic Dishonesty**

Academic dishonesty will not be tolerated under any circumstance. This includes unintentional plagiarism of previously published material. All students are expected to follow the Goizueta Business School Honor Code.

### **Access, Disability Services, and Resources**

Students may request additional time on quizzes and other accommodations by contacting the Office of Accessibility Services. Please notify the professor during the first week of class if you would like such accommodations.

### **Additional Course Policies**

1. Express your ideas and respect the ideas of others.
2. Show up to class on time and be ready to engage.
3. Discuss all absences via e-mail with the professors beforehand. However, this does not guarantee the absence will be excused. Absences for “super days” and interviews are not considered excused.
4. Laptops should only be used with prior approval from the instructor – and no laptops may be used for guest speakers. Turn off all cell phones.
5. Discuss grade concerns as they arise and *not* at the end of the semester. Specific concerns about assignments must be submitted in writing within 48 hours of receiving the grade.
6. Anyone who has difficulty securing course materials, housing, or food and believes this may affect their course performance is urged to contact Campus Life and, if comfortable, the professor to see what resources are available.

## Course Schedule

The first half of the semester focuses on the role of foundations in addressing public problems, your team's giving philosophy and theory of change, and the history and current state of the Clarkston, East Lake, and Southside communities. The second half of the semester dives deep into how philanthropic investments get made, including how organizations get selected and how gifts are evaluated. The semester also has plenty of "flex time" for teams to work on their foundation's gifts and related documents.

All of the readings are available for free. However, there are many fantastic books on the philanthropy and Atlanta that you may wish you check out at some point during your professional or philanthropic career. Some of these include:

- Brest, Paul and Hal Harvey. 2008. *Money Well Spent: A Strategic Plan for Smart Philanthropy*. Bloomberg.
- Buchanan, Paul. 2019. *Giving Done Right: Effective Philanthropy and Making Every Dollar Count*. PublicAffairs.
- Callahan, David. 2017. *The Givers: Wealth, Power, and Philanthropy in a New Gilded Age*. Vintage.
- Eliasoph, Nina. 2011. *Making Volunteers: Civic Life After Welfare's End*. Princeton.
- Gravel, Ryan. 2016. *Where We Want to Live: Reclaiming Infrastructure for a New Generation of Cities*. St. Martin's.
- Johnson, David Cay, ed. 2014. *Divided: The Perils of Our Growing Inequality*. The New Press.
- Kruse, Kevin M. 2007. *White Flight: Atlanta and the Making of Modern Conservatism*. Princeton.
- Lupton, Robert D. 2012. *Toxic Charity: How Churches and Charities Hurt Those They Help, and How to Reverse It*. HarperOne.
- Pendergrast, Mark. *City on the Verge: Atlanta and the Fight for America's Urban Future*. Basic.
- Reich, Rob. 2018. *Just Giving: Why Philanthropy is Failing Democracy and How it Can Do Better*. Princeton.
- Singer, Peter. 2009. *The Life You Can Save*. Random House.
- Villanueva, Edgar. 2018. *Decolonizing Wealth: Indigenous Wisdom to Heal Divides and Restore Balance*. Berrett-Koehler.
- Walker, Darren. 2019. *From Generosity to Justice: A New Gospel of Wealth*. Ford Foundation.

## Wednesday, January 15 – Introductions / \$10 challenge

### What To Read / Stream

Walker, Darren. 2019. *From Generosity to Justice: A New Gospel of Wealth*. Ford Foundation. Chapters 1-2. Available [here](#) to read or stream as an audio book.

## Monday, January 20 – No class (MLK)

## Wednesday, January 22 – Leadership style workshop

Discussion leads:

### What To Submit / Prepare

Take 20Q "hunch survey" about yourself [here](#).  
Signed Philanthropy Lab grant letter due.

### What To Read / Stream

CIO Journal (2019). "Business Chemistry: Crafting Powerful Work Relationships". Available [here](#).

Silverman, Les and Lynn Taliento. 2006. "What Business Execs Don't Know – but Should – About Nonprofits." *Stanford Social Innovation Review* (Summer): 37-43.

## Monday, January 27 – Why do we give? / Giving in the U.S.

TEAM SPRINT: CHARTER

Discussion leads:

### What To Submit / Prepare

Individual Profile due.

### What To Read / Stream

Urban Institute. 2018. "The Nonprofit Sector in Brief 2018: Charities, Giving, and Volunteering." Available [here](#).

Duhigg, Charles. 2017. "Why Don't You Donate for Syrian Refugees?" *New York Times*, June 14.

*Future Perfect* (podcast), 2019. "Gilded Rage." Stream it [here](#).

### Optional Deep Dives

Sadeh, Jana, Mirco Tonin, and Michael Vlassopoulos. 2014. "Why Give Away Your Wealth? An Analysis of the Billionaires' View." Read pre-print version [here](#).

Stanford Graduate School of Business. 2004. "Philanthropy in America, An Historical and Strategic Overview" Available [here](#).

## Wednesday, January 29 – Crafting a philanthropic legacy

TEAM SPRINT: CHARTER

### Guest Speaker

Michael J. Coles, co-founder of Great American Cookie Co.

### What To Submit / Prepare

Submit questions for Mr. Coles via class Google Doc.

### What To Read / Stream

Brett, Jennifer. 2019. "Great American Cookies co-founder shares trials, triumphs in memoir." *The Atlanta Journal-Constitution*, January 25. Available [here](#).

## Monday, February 3 – Philanthropy and inequality in Atlanta

Discussion leads:

### What To Submit / Prepare

Team Charter due.

#### What To Read / Stream

Pendergrast, Mark. 2017. *City on the Verge*. Basic. Chapter 4.

Rice, Solana, Dominique Derbigny and Lebaron Sims. 2017. "Advancing Collective Prosperity Through Entrepreneurship in Atlanta." *Prosperity Now*. Available [here](#).

Philipp, Alicia. 2019. "Opinion: Atlanta's future is not one-dimensional." *The Atlanta Journal Constitution*, December 7. Available [here](#).

### Wednesday, February 5 – Philanthropy and inequality in Atlanta

TEAM SPRINT: GIVING PHILOSOPHY

#### Guest Speaker

TBD.

#### What To Read / Stream

Annie E. Casey Foundation. 2019. *Changing the Odds: Progress and Promise in Atlanta*. Available [here](#). You can also check out an interview with Janelle Williams, lead author of the report, and WABE's Rose Scott [here](#).

#### What To Submit / Prepare

Submit questions for guest speaker via class Google Doc.

### Monday, February 10 – Team meetings / theories of change

TEAM SPRINT: GIVING PHILOSOPHY

#### What To Read / Stream

Brest, Paul. 2010. "The Power of Theories of Change." *Stanford Social Innovation Review* (Spring): 47-51.

Grantcraft. 2018. "Mapping Change: Using a Theory of Change to Guide Planning and Evaluation." Available [here](#).

### Wednesday, February 12 – Team breakouts with community coaches

#### What To Submit / Prepare

Giving Philosophy due.

#### What To Read / Stream

Pre-read differs based on community assignment (Clarkston, East Lake, Southside Atlanta). TBD.

### Monday, February 17 – Identifying community needs and assets

TEAM SPRINT: SITE VISIT

Discussion leads:

**What To Read / Stream**

*This American Life* (podcast), 2013. "I Was Just Trying to Help." Stream it [here](#).

Villanueva, Edgar. 2018. *Decolonizing Wealth*. Berrett-Koehler. Chapters 4 and 5.

**Optional Deep Dives**

Wilkis, Ariel. 2018. *The Moral Power of Money*. Chapter 3.

**Wednesday, February 19 – When philanthropy fails**

TEAM SPRINT: SITE VISIT

Discussion leads:

**What To Read / Stream**

*Future Perfect* (podcast), 2019. "Move Fast and Break Schools."

Matthews, Dylan and Byrd Pinkerton. 2019. "Mark Zuckerberg wanted to help Newark schools. Newark residents say they weren't heard." *Vox*, July 3.

Stream the podcast and read the article [here](#).

**Optional Deep Dives**

Russakoff, Dale. 2015. *The Prize: Who's in Charge of America's Schools?* Houghton Mifflin Harcourt.

**Monday, February 24 – Understanding the ecosystem I**

TEAM SPRINT: SITE VISIT

Discussion leads:

**What To Submit / Prepare**

Position Paper 1 due (if this is the one you chose).

**What To Read / Stream**

Crutchfield, Leslie R. and Heather McLeod-Grant. 2012. "Local Forces for Good." *Stanford Social Innovation Review* (Summer): 36-41.

Additional reading TBD.

**Wednesday, February 26 – Understanding the ecosystem II**

TEAM SPRINT: SITE VISIT

**What To Submit / Prepare**

In lieu of class, each team will spend one morning in their community along with their community coach. More details to come.

## Monday, March 2 – Team presentations of site visits

### What To Submit / Prepare

Site Visit Report due.

## Wednesday, March 4 – Philanthropy Lab visit

### Guest Speaker

Cristina Desmond and Bethany Harper from Philanthropy Lab will visit class. More details to come.

### What To Submit / Prepare

Submit questions for guest speaker via class Google Doc.

## Monday March 9 and Wednesday, March 11 – No class (Spring Break)

## Monday, March 16 –Identifying organizations

TEAM SPRINT: IDENTIFY ORGS

Discussion leads:

### What To Read / Stream

The Bridgespan Group. “How to Research a Nonprofit – Light-Touch Approach.” Available [here](#).

Community Foundation for Greater Atlanta. 2017. “Checklist for Giving: Nonprofit Best Practices.” Available [here](#).

Starr, Kevin. 2011. “Just Give ‘Em the Money: The Power and Pleasure of Unrestricted Funding.” *Stanford Social Innovation Review*. August 3. Available [here](#).

Buchanan, Paul. 2019. *Giving Done Right*. Chapter 5.

## Wednesday, March 18 – Nonprofit 990 and funding models

TEAM SPRINT: IDENTIFY ORGS

Discussion leads:

### What To Submit / Prepare

Position Paper 2 due (if this is the one you chose).

### What To Read / Stream

Guidestar. 2016. *Highlights of the Form 990*. Available [here](#).

William Landes Foster, Peter Kim, & Barbara Christiansen. 2009. “Ten Nonprofit Funding Models.” *Stanford Social Innovation Review* (Spring): 32-39.

### Optional Deep Dives

Friedman, Eric. 2013. *Reinventing Philanthropy*. Chapter 5.

**Monday, March 23 – Outcomes and impacts**

TEAM SPRINT: IDENTIFY ORGS

Discussion leads:

**What To Submit / Prepare**

Optional giving goals due and posted to Philanthropy Lab website.

Discuss Philanthropy Lab requirements related to outcome and impact measurement including role for class members to play over next 2 years.

**What To Read / Stream**

Ebrahim, Alnoor and V. Kasturi Rangan. 2014. "What Impact? A Framework for Measuring the Scale and Scope of Social Performance." *California Management Review* 56(3): 118-141.

**Optional Deep Dives**

Barman, Emily. 2016. *Caring Capitalism*. Chapter 2.

**Wednesday, March 25 – Strategic giving**

TEAM SPRINT: IDENTIFY ORGS

Discussion leads:

**What To Read / Stream**

Buchanan, Paul. 2019. *Giving Done Right*. Chapter 4.

Nancy Chan & Pamela Fischer. 2016. "Eliminating Implicit Bias in Grantmaking Practice." *Stanford Social Innovation Review*. December 1. Available [here](#).

**Monday, March 30 – Team breakouts with community mentors**

TEAM SPRINT: GRANTEE REVIEW

**What To Submit / Prepare**

Teams should be prepared to discuss their finalist organizations and suggested donation amounts to their community mentors.

**Wednesday, April 1 – Pulling it all together / team work session**

TEAM SPRINT: FINALIZE DECISIONS

**What To Submit / Prepare**

Philanthropic Interview due.

Teams should make their final decisions and prepare the draft of their briefing book.

**Monday, April 6 – Team presentations / pitches**

TEAM SPRINT: FINALIZE DECISIONS

**What To Submit / Prepare**

Briefing Book draft due.

Teams will present their giving decisions and pitch any additional requests using available bonus money.

### Wednesday, April 8 – Team presentations / pitches

TEAM SPRINT: FINALIZE DECISIONS

#### What To Submit / Prepare

Teams will present their giving decisions and pitch any additional requests using available bonus money.

### Monday, April 13 – Philanthropy and democracy

TEAM SPRINT: FINALIZE DECISIONS

Discussion leads:

#### What To Read / Stream

Inside Social Innovation (podcast), 2018. “Debating the Role of Philanthropy in Democracy.” Stream this conversation between Stanford professor Rob Reich, Netflix co-founder Reed Hastings, and Ford Foundation President Darren Walker [here](#).

Giriharadas, Anand. 2018. *Winners Take All*. Chapter 1.

### Wednesday, April 15 – Giving ceremony prep

TEAM SPRINT: GIVING CEREMONY

#### What To Submit / Prepare

Position Paper 3 due (if this is the one you chose).

### Monday, April 20 and/or Wednesday, April 22 – Giving ceremony

TEAM SPRINT: GIVING CEREMONY

#### What To Submit / Prepare

Class will host a giving ceremony and present their gifts to each recipient organization.

### Monday, April 27 – What now?

Discussion leads:

#### What To Submit / Prepare

Final Briefing Book due.

Elect grant evaluation representatives.

Identify candidates to attend Philanthropy Lab Student Ambassador Conference June 18-21, 2020 in Dallas, Texas.

#### What To Read / Stream

Singer, Peter. 2009. *The Life You Can Save*. Chapters 5, 9, and 10. Download the electronic version [here](#).

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### Two Position Papers (25 points or 12.5% each) – Due Dates Vary

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Matching the practices of successful foundations, each student team will prepare and present to the class a statement document that outlines their mission, values, priority focus areas, broad theory of change, along with any other qualification requirements related to potential grantees.

### **Community Site Visit Report (20 points or 10%) – Due March 2**

Working closely with your assigned community coach, you will plan, execute, and summarize key learnings from your visit(s) to the community. Each team will complete a summary and present to class. Summaries will include more details on history of community, assets and challenges, key ecosystem insights, along with a short list of top stakeholders that your team will plan to engage as you finalize potential grantee nominations. Two student teams will be assigned to each community and should conduct a single, joint community visit experience in collaboration with your community coach.

## Funding Briefing Book (30 points or 15%) – Due April 6 (Draft) and April 27 (Final)

Building on all of the previous team assignments completed earlier in the semester, each team will assemble a briefing book which summarizes their giving philosophy, nominated grantee candidates, funding decision rationale / rating, recommended funding amounts, and, if applicable, funding restrictions. The briefing document should be a professional summary of all related work, including any charts and photographs, that can be archived and shown to future classes. A presentation and draft of the briefing book will be due April 6 as part of your final giving decision. The final book will be due on April 27.

### Evaluation

Grades for this course are based on the scheme outlined above. All assignments will be graded together by the faculty and the TA. The grades for this class will have an *anticipated* distribution according to the suggested guidelines of the BBA program office. Contact the professors if you have concerns about your grade as the semester progresses. *However, under no circumstance will grades be discussed after the final class.*

<u>Grade</u>	<u>Points</u>
A	186-200
A-	180-185
B+	174-179
B	165-173
B-	160-164
C+ or below	159 and below

### Academic Dishonesty

Academic dishonesty will not be tolerated under any circumstance. This includes unintentional plagiarism of previously published material. All students are expected to follow the Goizueta Business School Honor Code.

### Access, Disability Services, and Resources

Students may request additional time on quizzes and other accommodations by contacting the Office of Accessibility Services. Please notify the professor during the first week of class if you would like such accommodations.

### Additional Course Policies

1. Express your ideas and respect the ideas of others.
2. Show up to class on time and be ready to engage.
3. Discuss all absences via e-mail with the professors beforehand. However, this does not guarantee the absence will be excused. Absences for “super days” and interviews are not considered excused.
4. Laptops should only be used with prior approval from the instructor – and no laptops may be used for guest speakers. Turn off all cell phones.
5. Discuss grade concerns as they arise and *not* at the end of the semester. Specific concerns about assignments must be submitted in writing within 48 hours of receiving the grade.
6. Anyone who has difficulty securing course materials, housing, or food and believes this may affect their course performance is urged to contact Campus Life and, if comfortable, the professor to see what resources are available.