

Philanthropy and Social Change
SLAM 3060-01, Fall 2017
School of Liberal Arts Management Minor
Tulane University
316A Newcomb Hall

Professor: Michele Adams
Office: 204 Newcomb Hall
Phone: 862-3015
Office Hours: Tuesday: 12:30 to 2:30 pm
and by appointment
E-mail: madams2@tulane.edu

TA: Tait Kellogg
Office: 220M Newcomb Hall
Office Hours: By appointment
E-mail: bkellog@tulane.edu

~~

To give away money is an easy matter and in any man's power. But to decide to whom to give it and how large and when, and for what purpose and how, is neither in every man's power nor an easy matter.
(Aristotle)

~~

Philanthropy is commendable, but it must not cause the philanthropist to overlook the circumstances of economic injustice which make philanthropy necessary. (Dr. Martin Luther King)

~~

Unless someone like you cares a whole awful lot, nothing is going to get better. It's not. (Dr. Seuss)

~~

Course Description

Today's world is full of challenges, particularly if you are perched precariously on the lower rungs of the social class ladder. If so, necessities such as food, safe shelter, and clothing may be hard to come by on a consistent basis. Social justice advocates tend to suggest that government should care for those of its citizens unable to care for themselves. But when government can no longer afford, for whatever reason, to supply the basic needs of its least fortunate citizens, the task of doing so tends to fall to the private sector of society, and philanthropic-minded individuals and foundations, religious and non-sectarian, are called on to pick up the slack in caring for those who are unable to care for themselves.

Philanthropy, which at its base means "love of humanity," tends to emerge most strongly during times of natural and/or human-made disaster or periods of intense social inequality, when the difference between the resources, opportunities, and assets of the "haves" and the "have nots" is the greatest. Since about the 1980s, increasing inequality as well as, more recently, rapidly accelerating and intensifying disaster scenarios, along with government's inability to keep up with the needs of its citizens, has exacerbated the need for philanthropy in the United States and around the globe. And philanthropy has "stepped up to the plate" in a big way.

According to the National Philanthropic Trust, in May 2015, there were over 1,521,000 charitable organizations in the United States, and, in 2016, giving by Americans (including individual giving, and giving by foundations, corporations, and through bequests) topped \$389 billion, up between 3.5% and 4.2% from giving in 2015. In fact, in 2016, charitable giving accounted for 2.1% of our gross domestic product. In this class, we look at the history, status, and composition of philanthropic giving in the United States, as well as the unequal distribution of resources that has been a major driver of the giving. We also examine critiques of the philanthropic sector, and look at suggestions for addressing some of these critiques.

But this is only part of what we'll be doing this semester. Each of you will also participate in the "giving" process, becoming part of a team that donates to a "worthy" (as assessed by your team) non-profit organization that works to alleviate the social problem in your local area that your team chooses to

address. A generous gift from *The Once Upon A Time Foundation* will give your team the opportunity to act as a board of directors of a fictional philanthropic foundation, researching a social problem in New Orleans, finding and doing due diligence on non-profits that address that problem, and, finally, narrowing the possible grantees to one or two grant recipients in the area.

Giving away money—sounds easy, doesn't it? But here's the rub—giving away money *to help others* may be one of the most difficult things any of us will ever do—as an individual donating \$5 or as a board member of a large foundation deciding how to distribute hundreds of thousands of dollars in the most effective way. How do we know what would “help” someone? How do we know how much money it takes to help? How can we be sure the people we're “helping” are using the money the way we intend for them to use it? Why should there be any “strings attached” to our giving them money anyway? These questions and more go into giving away money to help others – no wonder it's so hard to do!

The primary objective of this course is to introduce you to the process of philanthropy, both intellectually and experientially. As more and more of the responsibility for the public good shifts from the government to the private sector, the significance and power of individuals and foundations at the center of philanthropic giving continues to grow. It is increasingly important, therefore, that you understand this burgeoning phenomenon so that you can make educated choices about whether, and how, to participate in this process over the course of your lifetime.

Required Readings

David Callahan. 2017. *The Givers: Wealth, Power, and Philanthropy in a New Gilded Age*. New York: Alfred A. Knopf. (hereafter referred to as “Callahan”)

Chuck Collins. 2016. *Born on Third Base: A One Percenter Makes the Case for Tackling Inequality, Bringing Wealth Home, and Committing to the Common Good*. Vermont: Chelsea Green Publishing. (hereafter referred to as “Collins”)

Additional readings posted to Canvas (hereafter “C”).

Course Goals, Learning Outcomes, and Linked Assessment

The overall goals of this class are (1) to introduce students to the concept of philanthropy, including its relationship to social justice and social change; (2) to encourage students to situate themselves in the philanthropic process for the short- and long-term; (3) to lead students to examine the areas of need in society, particularly in the City of New Orleans; (4) to give students hands-on experience in socially responsible philanthropic giving; (5) to encourage students to develop effective teamwork habits; (6) to increase students' abilities to articulate, verbally and in writing, effective social arguments, and (7) to encourage students to think about how they can contribute to the public good over the course of their lifetime. In accomplishing these goals, over the course of the semester, students' knowledge and skills will be enhanced in a number of ways, congruent with the following specific objectives. By the end of the semester, students will:

- (1) have a working understanding of how philanthropy operates,
--assessed via reflection and analytical papers, team presentations, team briefing book, and class participation;
- (2) be cognizant of their underlying values and assumptions about the process of “giving,”
--assessed via reflection paper and class participation;
- (3) be able to think critically about philanthropy and strategize philanthropic giving in terms of its ability to alleviate social problems,
--assessed via reflection and analytical papers, team presentations, team briefing book, and class participation;
- (4) be an effective team member, working with others to make decisions and resolve individual differences,

- assessed via team participation and team presentations;
- (5) be able to argue in favor of, or in opposition to, various philanthropic investment strategies, both in oral presentations and in written assignments,
--assessed via team presentations, team briefing book, class and team participation, and various in-class exercises and debates;
- (6) be able to envision a lifetime giving plan for themselves and have sufficient initial understanding of the philanthropic process to decide their level of participation,
--assessed via class and team participation and reflection paper.

General Structure of the Course

The course will be structured around two interwoven components. The academic component of the class will include some lecture, but mostly class discussion designed to inform, directly and indirectly, your approach to the experiential (“Lab”) part of the class, which will include small group work, agency site visits, and the hands-on development of a strategy for effectively distributing team funds. We will also have guest speakers from time to time, people who are working (or have worked) in philanthropy and can share their experiences with you.

The course includes a mandatory service learning component, which will be engaged through an additional fifty-minute class period scheduled on Friday mornings from 9:00 am to 9:50 am, in room 123 of Newcomb Hall. We plan to use most of these “Philanthropy Friday” morning class sessions for our guest speakers and for additional teamwork time. Please make sure that you take this additional class period into consideration when planning your class schedule—we will be taking attendance at these sessions.

The class has received a very generous grant from the “Philanthropy Lab” initiative of the *Once Upon a Time Foundation* to invest in nonprofit organizations in the New Orleans area. At the beginning of the semester, the class as a whole will decide on five “problem issues” experienced in New Orleans or by New Orleansians, and five teams will be organized around those problem issue areas. After initial research, each team will constitute a list of four or five “possible” nonprofit organizations addressing that team’s particular social issue. Over the course of the semester, each team is expected to develop an argument and philanthropic plan to fund one or more of their potential grantees, based on team-developed criteria. To do so, students will participate in team discussions to establish a statement of team values, a team mission statement, and a jointly developed problem statement. Team members will be expected to visit their prospective grantee agencies, engage with agency personnel, and do other research as necessary to develop relevant information needed to inform their decision-making process. Additional team discussion will lead to development of a funding plan, and a plan for evaluation of the effectiveness of their grant, that will be presented to the class at the end of the semester. For each team meeting, a facilitator and a recorder will be assigned, on a rotating basis, to assure that discussion moves smoothly and accurate records are kept. Due to the nature of the team experience, students should expect to spend some time outside of class doing site visits and otherwise working towards development of their funding plans. As noted, we may use the Friday service learning class session (Philanthropy Fridays) to allow time for additional group work.

At the end of the semester, all this work will culminate in an award-presentation party, where each team will present a “large” check to its chosen organization(s). This award ceremony is scheduled for our “final exam” day, which will be **Friday, December 15, from 8:00 am to noon**. Attendance at the ceremony is mandatory (and it’s fun!).

Course Requirements

Attendance: Students are expected to come to class (on discussion and lab days, as well as Philanthropy Fridays) fully prepared, having read and understood all assigned readings and having completed all assigned exercises beforehand. Because of the close interrelationship of the hands-on lab portion of the course with the academic portion, and the fact that each student is a vital component of their team,

attendance is critical—all students are expected to attend all classes, and lapses in attendance will affect a student’s grade for the course. We will be taking attendance throughout the semester. As noted above, attendance at the award ceremony on Friday, December 15, from 8:00 am to noon, is mandatory.

Professionalism: You will be interacting on a frequent basis with prospective grantees as you conduct site visits and gather information from them. Please remember that you are representing not only yourself and this class when you do so, but also Tulane University. During such interactions and at all times, we expect you to maintain the highest standards of professionalism, including respecting and maintaining agency confidentiality and that of their clients.

Accommodations: Any students with disabilities or other needs, who need special accommodations in this course, are invited to share these concerns or requests with the instructor and contact Goldman Center for Student Accessibility: <http://accessibility.tulane.edu> or 504.862.8433.

Code of Academic Conduct

“The Code of Academic Conduct applies to all undergraduate students, full-time, and part-time, in Tulane University. Tulane University expects and requires behavior compatible with its high standards of scholarship. By accepting admission to the university, a student accepts its regulations (i.e., Code of Academic Conduct: <http://tulane.edu/college/code.cfm>, Code of Student Conduct: <http://tulane.edu/studentaffairs/conduct/code.cfm>) and acknowledges the right of the university to take disciplinary action, including suspension or expulsion, for conduct judged unsatisfactory or disruptive.”

Please ask me if you have any questions about this policy and its application to this class.

No laptops, I-Pads, Smartphones, or other electronic devices are allowed EXCEPT on those days when you are doing teamwork or unless you have made prior arrangements with me. Research continues to show that students understand and retain information better when they listen and take notes by hand than when they use laptops or other electronic devices—so this rule is for your benefit!

One Wave

Tulane University recognizes the inherent dignity of all individuals and promotes respect for all people. As “One Wave,” Tulane is committed to providing an environment free of all forms of discrimination based on race, ethnicity, creed, religion, gender, gender identity and sexual orientation, as well as all forms of sexual harassment, including sexual assault, domestic and dating violence, and stalking. If you (or someone you know) has experienced or experiences discrimination, domestic violence, sexual assault or sexual harassment, know that you are not alone. Resources and support are available. Learn more at onewave.tulane.edu. Any and all of your communications on these matters will be treated as either “Strictly Confidential” or “Mostly Confidential” as explained in the chart below.

Strictly Confidential	Mostly Confidential
Except in extreme circumstances, involving imminent danger to one’s self or others, nothing will be shared without your explicit permission.	Conversations are kept as confidential as possible, but information is shared with key staff members so the University can offer resources and accommodations and take action if necessary for safety reasons.
Counseling & Psychological Services (CAPS) (504) 314-2277	Coordinator of Violence Prevention (504) 314-2161
Student Health Center (504) 865-5255	Tulane University Police (TUPD) (504) 865-5911
Sexual Aggression Peer Hotline and Education (SAPHE) (504) 654-9543	Office of Institutional Equity (504) 862-8083

Assignments and Grading:

Assignments for the course include:

1. Various (announced and unannounced) in-class debates and exercises (5% total);
2. Reflection paper (10%)
3. Analytical paper (25%);
4. Two team-level presentations (15% total)
5. Team “briefing book” (30%)
6. Active and thoughtful participation in class discussions (10%)
7. Active and thoughtful team participation as assessed by team members (5%)

Specifically, assignments include:

1. Various in-class debates and exercises (5% total)

Over the course of the semester, you will be asked to take part in various formal and informal debate sessions, panel discussions, and other in-class exercises that will draw from the course readings. These debates/exercises may or may not be announced beforehand. When we engage these debates/exercises, you will be evaluated on your grasp of the readings and your ability to apply the readings to the various exercises. **If it appears that students are not doing the reading, then we reserve the right to give unannounced pop quizzes over the readings.**

2. Reflection paper (10%)

This paper will address your current philosophy and experience of giving, drawing on times that you have donated money, or volunteered your time, to a social cause. In it, you will be expected to explore your values and beliefs about giving and what motivates you to give or refrain from giving. Guidelines will be posted on Canvas.

3. Analytical paper (25%)

One of the more prevalent debates regarding the increasing size and sheer influence of philanthropy today has to do with the power wielded by big foundations and donors relative to that of the “ordinary” citizen. Huge donors such as the Gates Foundation, and others of its ilk, have enormous influence over the way our institutions are (re)structured and the types of solutions that we seek to problems such as climate change and even new medical innovation. This paper will give you the opportunity to engage with that debate, and to offer your own insights and creative solutions to the issues that this debate circumscribes. One of your textbooks, *The Givers* by David Callahan, will be used for foundational information regarding this debate. The final section of the paper will give you the opportunity to “update” your personal philanthropic philosophy and plans. Detailed guidelines for this paper will be posted on Canvas .

4. Two team presentations (15% total)

a) Presentation #1 (15 minutes, including questions). This presentation is your team’s opportunity to introduce itself to the class, including your issue, your mission, and your slate of possible grantees. It is also your opportunity to get feedback from the class on how to approach your site visits. (5%)

b) Presentation #2 (30 minutes, including questions). This presentation is your team’s opportunity to present its final funding decision to the class. The purpose is to deliver a persuasive argument to classmates, informing them of your position about what you want to do and why. (10%)

5. Team Briefing Book (30%)

Each team will be expected to develop a single “briefing book” that addresses how they reached their funding decision. This briefing book will provide a detailed guide to what you’ve done as a team over the course of the semester. Detailed guidelines, including specifications for content, will be discussed in class and posted on Canvas. Although each team will turn in one briefing book, it should represent the effort of all team members – each team member will receive the same grade on the team briefing book **UNLESS**

one or more members is reported by a majority of the team to be under-participating in the process. The briefing book will be turned in twice during the semester, with the first draft due **October 19** and the completed final Briefing Book due **December 8**.

6. Class participation and “Active” Attendance (10%)

Students are expected to participate fully and thoughtfully in all class discussions. This means that I expect each student to come to class prepared to discuss and engage with the class by having completed all reading and assignments beforehand. To participate, you must attend classes—moreover, I expect “active” attendance, meaning that you are **fully focused** on our class (whether our class involves discussion, lecture, guest lecture, or teamwork that day) and **NOT** completing work for another class or spending our class time surfing the web or being otherwise disengaged.

7. Team participation (5%)

Each student is expected to be an active participant in team activities, including, among other things, discussion, site visits, decision making, and involvement in preparation of the team briefing book. Free riders are not only unconstructive in and of themselves, but they shift the burden of work to their team members. For this reason, each student will be evaluated anonymously by their respective team members on the last day of class in terms of active, constructive, and effective team participation.

Each team will be expected to keep their “Team Page” on Canvas up-to-date with minutes of team meetings and other team documents to be discussed in class—one team member should be designated to make sure that the Team Page is always up-to-date. All team members will have access to these Team files and can add notes or information to them at any time; team members are encouraged to add newspaper articles or other miscellaneous information that contributes to the store of information that the team can draw on. These materials will be very important as you work together towards your funding decisions. These materials will also be used to develop the briefing book that each team will produce to submit after funding decisions have been made.

Course Grading Criteria:

In-Class Debates / Exercises	5%
Team Presentation #1 (Oct. 17, 19)	5%
Team Presentation #2 (Nov. 28, 30, Dec. 5)	10%
Reflection Paper (Sept. 14)	10%
Analytical Paper (Dec. 15)	25%
Class participation and attendance	10%
Team participation	5%
Team Briefing Book (Dec. 8)	<u>30%</u>
Total	100%

Tentative Schedule
SLAM 3060-01, Fall 2017
Philanthropy and Social Change

PLEASE NOTE: Schedule may change due to availability of guest speakers, hurricanes, flooding, and other factors beyond the instructor's control.

PLEASE PLEASE NOTE: Readings are shown on the dates they are due. That is, the reading shown on September 5 should be read for the September 5 class, etc..

Week 1: What is Philanthropy? "Doing Good" in New Orleans

August 31: Introductions and Overview of the Class: What is philanthropy?

>>> **Task:** Take Philanthropy Lab Pre-Course survey

September 1: Philanthropy Friday

Readings:

- Five short news articles on Canvas regarding social issues faced by New Orleans (C)

>>> **Task:** Vote on issues; constitute five teams.

Week 2: Philanthropy and You

September 5: Philanthropy and Personal Values: Why give?

Readings:

- Carnegie, from "The Gospel of Wealth" (C)
- Kelley, "There's No Such Thing as Bad Charity" (C)
- Yunus, "A Hand Up, Not a Hand Out: Why Not Microloans for Katrina Victims?" (C)
- Hayakawa, "The Story of A-Town and B-Ville" (C)
- Barbusse, "The Eleventh" (C)
- Maimonides, "Eight Levels of Tzedakah (Giving)" (C)
- Tierney & Fleishman, "What are My Values and Beliefs?" (C)

September 7: Lab Day – Turning Individual Values into Team Values

Readings:

- Gary, Inspired Philanthropy, (various) (C)

>>> **Team Task:** Meet with your team. First, appoint someone to act as a "facilitator" – someone who will guide team conversations for the day, and a recorder to take minutes for this week—these roles will rotate every lab session. Get to know your teammates. What are your initial thoughts and experiences on giving? What do you believe you can add to the group process? What values and beliefs do you bring to the group? Discuss how your team can negotiate a set of team values that is agreed to by all team members. Create a first draft of your team values statement, post that draft to your team page on the course Canvas site.

>>> **Team Task 2:** Begin brainstorming for your initial "slate" of nonprofits that will be evaluated by your team for possible funding. How will you pick them? Your initial slate must include **10** nonprofits (you will eventually narrow the list to 4 or 5). Your potential grantees **MUST BE** classified

as 501(c)(3) organizations and **CANNOT BE** politically-oriented. We will discuss these classifications in more detail in class.

September 8: Philanthropy Friday

>>> **Task:** Discuss Grant Letter and Opportunities from Philanthropy Lab

>>> **Team Task:** Continue working on Team Task 2 from September 7 if time permits.

Week 3: Philanthropy, Inequality, and Social Justice

September 12:

Readings:

- Collins, *Born on Third Base*, Preface, and Parts 1 and 2 (thru p. 55)
- Cohen, "Philanthropy and the Role of Social Justice" (C)
- Jones, "Doors and Mirrors: Reflections on the Art of Philanthropy" (C)
- Singer, "What Should a Billionaire Give—And What Should You?" (C)

September 14: Lab Day – Problem Statement; Values Statement; Mission Statement

Readings:

- Brest & Harvey, *Money Well Spent* (C)

Resources:

- Theory of Change youtube video: https://www.youtube.com/watch?v=6zRre_gB6A4
- Example of Theory of Change, youtube video: https://www.youtube.com/watch?v=urU-a_FsS5Y
- Mackinnon, Amott, & McGarvey. "Mapping Change." (C)
- W.K. Kellogg Foundation, *Logic Model Development Guide*, pp. 1-14 (C)

>>> **Team Task 1:** Begin drafting your team's "problem statement," specifically defining what problem you will address with your funding.

>>> **Team Task 2:** Begin drafting your team's "mission statement," or what your team hopes to achieve through its philanthropic efforts.

>>> **Team Task 3:** Finalize your team's statement of values. Post the statement of values to your team page on Canvas.

>>> **Team Task 4:** Finalize your team's initial slate of nonprofits and create a matrix or some formal mechanism that allows you to compare them. What do they do? What are their core programs? What specific problem(s) do they address? Each team member should take on two nonprofits to research for the next Lab Day (September 21).

>>>> **Assignment Due: Reflection Paper**

September 15: Philanthropy Friday

Week 4: Philanthropy in Practice: Ethics and Accountability

September 19:

Readings:

- "Gates Foundation failures show philanthropists shouldn't be setting America's public school agenda." Los Angeles Times editorial, June 1, 2016.
<http://www.latimes.com/opinion/editorials/la-ed-gates-education-20160601-snap-story.html>

- Frumkin. "Wielding Philanthropic Power Responsibly: The Problem of Legitimacy." (C)
- Reich. "A Failure of Philanthropy." (C)
- Joyce. "Letter to the Council on Foundations." (C)
- Collins, *Born on Third Base*. Pp. 59-100.
- TBA

September 21: Lab Day

- Gary, *Inspired Philanthropy*, "Creating a Mission Statement." (C)

>>> Team Task: Collectively develop a final draft of your mission statement and values statement. Post these documents to your team page on Canvas. Complete and discuss the matrix your team has created comparing the original slate of nonprofits; then compare these agencies' mission statements and values to your team's mission and values. Begin to narrow down your list to the 4 or 5 nonprofit organizations that best "represent" your team's mission and values.

September 22: Philanthropy Friday

Week 5: From Charity to Philanthrocapitalism

September 26

Readings:

- Payton & Moody, *Understanding Philanthropy*, "The Social History of the Moral Imagination," (C)
- Callahan, *The Givers*. Pp. 3-60.
- Bishop and Green, "Philanthrocapitalism Rising" (C)
- Edwards, "Why Business Won't Save the World" (link to YouTube video on Campus)
- Porter: "Why Business Can Be Good at Solving Problems" (link to YouTube video on Campus)
- TBA

September 28: Lab Day

>>> Team Task 1: Prioritize your initial slate of nonprofits, and collectively settle on your four or five top choices. Carefully document why you have prioritized your list as you have, and how you decided on your top "finalists." Post your prioritized list to your team Canvas page, along with the contact information (contact name, mailing address, email address) for each of the top five organizations. Your instructors will send letters of introduction to these organizations prior to your contacting the organization.

>>> Team Task 2: Begin doing in-depth research into the social issue that your team has chosen to address with your grant. What is the extent of the problem in New Orleans? What efforts are currently underway to solve it? Why does this problem require your team's attention? Why is it important to address? Write up a one- to two-page summary of your team's social issue as it relates to New Orleans from your team's perspective and post it to your canvas page by October 5. You may do this work and write-up collectively or assign individual segments of research and writing to each team member. Make sure that the problem/issue is well-defined and justifies your philanthropic interest—your team will be making a big financial investment in an organization working to solve it!

September 29: NO Philanthropy Friday

Week 6: Dynamics of Giving I: Prudent Giving and Due Diligence

October 3: Assessing Potential Recipients/Programs

Readings:

- Brest & Harvey, from *Money Well Spent*. (C)
- Friedman, Chapter 5: “The Paucity of Helpful Information” from *Reinventing Philanthropy*. (C)
- Friedman, Chapter 7: “The Most Important Decisions” from *Reinventing Philanthropy*. (C)
- Friedman, Chapter 10: “Choosing a Charity” from *Reinventing Philanthropy*. (C)

October 5: Lab Day: Information Gathering / Application for Funding / Request for Site Visit

Resources:

- La Piana Consulting, “Due Diligence Done Well: A Guide for Grantmakers.” (C)
- The Bridgespan Group, “How to Research a Nonprofit—Light-Touch Approach.”
<http://www.bridgespan.org/Philanthropy-Advice/Researching-Nonprofits/Due-Diligence-Tool/How-to-Research-a-Nonprofit%E2%80%94Light-Touch-Approach.aspx#.VduoMvIvhBc>

>>> **Team Task:** Decide what information you will need to get from your “finalists” to help you make funding decisions. Make a distinction between the information you can need “on paper” (mostly financial info) and the information you will get on a site visit. Develop an “application for funding” that you will send to your finalists. Send out your “applications for funding” to your selected finalists (they will be expecting to hear from you). Make sure to note the deadline of **October 19** by which they need to respond. **In the email to each of your finalist nonprofits, suggest a proposed day and time for a site visit—please note that we have set aside the week of October 23 for site visits.**

October 6: Philanthropy Friday

>>>> Guest speaker: How to Research (and Choose) Potential Grantees

Week 7: Dynamics of Giving II: Effectiveness and Evaluation

October 10: Assessing Impact of Your Gift

Readings:

- Readings TBA

October 12: NO CLASS – FALL BREAK!!

October 13: NO Philanthropy Friday

Week 8: Team Presentations #1

October 17:

>>>> Team Presentations #1 (3 teams)

October 19:

>>> Team Presentations #1 (2 teams)

Lab Day (remainder of class time)

>>> **Team Task:** Assess the information that has come in from your applications for funding. What additional information will you need from these nonprofits during your site visits? Create a list

of questions that you will ask the nonprofits—post the list of questions to your team Canvas page. Assign a team member to coordinate all site visits. Decide which team members (in teams of 2 to 3) will visit which sites; every team member should visit at least two sites.

>>>> First Draft of Team Briefing Book Due. This draft will not be graded, but will allow instructors to give feedback to each team to facilitate development of the final team briefing book. All the team process up to the site visits should be included in this first draft.

October 20: Philanthropy Friday

>>>> Guest Speaker on Site Visits

Week 9: SITE VISITS

October 24: Site visits – No Class

Readings:

- Orosz, *The Insider's Guide to Grantmaking*, "Site Visits" (C)
- Emerson, Fretz, & Shaw, *Writing Ethnographic Fieldnotes*, "In the Field: Participating, Observing, and Jotting Notes" (C)
- Eisenberg, "Penetrating the Mystique of Philanthropy: Relations between Fund Raisers and Grant Makers" (C)

Resources:

- The Bridgespan Group, "Quick Guide to Conducting a Nonprofit Site Visit." (C)
- The Bridgespan Group, "Guide to Interviewing a Nonprofit's CEO." (C)
- The Bridgespan Group, "Guide to Interviewing a Nonprofit Board Member." (C)

October 26: Site visits – No Class

October 27: No Philanthropy Friday – continue with site visits

Week 10: Seeking Grants / Fundraising for Nonprofits

October 31: Guest Speaker on Fundraising

Readings:

- Readings TBA

November 2:

>>> Team Task: Discuss and evaluate site visits. Begin to rank finalists based on initial assessments. Is there any additional information you need? If so, email the relevant nonprofit(s) for that information. If needed, arrange for additional site visits.

November 3: Philanthropy Friday

Week 11: The Charitable-Industrial Complex – Critiquing Philanthropy

November 7:

Readings:

- Collins, Collins, *Born on Third Base*. Pp. 103-126.
- Callahan, *The Givers*. Pp. 61-111.
- Buffett, "The Charitable-Industrial Complex." *New York Times*, July 26, 2013 (C)

- Buchanan, “On Peter Buffett’s Op-Ed.” (C)

November 9: Lab Day

>>> Team Task: Continue discussion and evaluation of site visits. Incorporate any new information that is coming in through email or additional visits. Discuss and adjust initial rankings.

November 10: Philanthropy Friday

Week 12: Big Philanthropy, Big Influence, Big Possibilities

November 14:

Readings:

- Callahan, *The Givers*. Pp. 212-282.

November 16: Lab Day: Decision Tools and Final Deliberations

Readings:

- Engelhardt, “Foundation Grants and the Grantor/Grantee Relationship,” (C)

Resources:

- Adams, “Developing a Decision Matrix.” (C)
- MindTools, “Decision Matrix Analysis.” (C)
- MindTools, “Decision Matrix Analysis Worksheet.” (C)
- The Bridgespan Group/GiveSmart, “Donor Decision Tool.” (C)

>>> Team Task: Begin final deliberations. Rate and rank nonprofits, make initial funding decisions. Be sure to document how you went about making those decisions.

November 17: Philanthropy Friday

>>> Team Task: Continue final deliberations, revisit initial decisions, make final funding decisions. Draft an email to be sent to each organization that you visited telling them whether you have decided to fund them or not and, briefly, why. **Please send drafts of both emails to Prof. Adams and Tait for review—DO NOT send these emails to the organizations until you have received approval from either Prof. Adams or Tait.** Plan for team presentations.

Week 13: Breathing Out

November 21: Lab Day

>>> Team Task: Work on assigning tasks for upcoming presentations and development of the Final Team Briefing Book.

November 23:

No class – **Have a Happy Thanksgiving!!**

Week 14: Final Team Presentations

November 28:

>>>> Team Presentations #2 (2 teams)

November 30:

>>>> Team Presentations #2 (2 teams)

December 1: Philanthropy Friday

Week 15: Philanthropy and You (Revisited)

December 5: Team Presentations #2 (1 team)

>>> **Team Task:** Team work on Briefing Book / Prepare for Awards Ceremony

December 7: Final Thoughts – You and Philanthropy

- Callahan, *The Givers*: “Epilogue: Balancing Act.” Pp. 283-313.
- Payton & Moody, *Understanding Philanthropy*, “Philanthropy, Democracy, and the Future,” (C)

December 8: Philanthropy Friday

>>>> **Final Team Briefing Book Due**

Friday, December 15: Final Exam Date and Awards Presentation

>>>> **No final exam, but Analytical Paper due on course Canvas site.**

Awards Presentation

Friday, December 15 from 8:00 am until noon.

This is when the fun starts – on Friday, December 15, from 8:00 am to noon, at a place to be announced (probably in the LBC), we will have a party where awards will be presented. At that time, each team will make a brief presentation introducing their grantee organization(s), and they will award the check to a representative from that/those organizations. Attendance is **mandatory** at the awards presentation ceremony!

~~ Have a Wonderful Winter Break! ~~