

Philanthropy and Social Change  
SLAM 3060-01 and SLAM 3890-01, Fall 2018  
School of Liberal Arts Management Minor  
Department of Sociology  
Tulane University  
NH 316A

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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)

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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)

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

Generosity is an American value, and philanthropy, which means “love of humanity,” is a practice of generosity rooted deep in American history. Ever since our nation’s founding, and continuing today, philanthropic leaders have worked hard and spent copious amounts of money to tackle large and small social problems. In fact, according to Giving USA 2018<sup>1</sup> and the National Philanthropic Trust<sup>2</sup>, in May 2015, there were over 1,521,000 charitable organizations in the United States, and, in 2017, giving by Americans (including individual giving, and giving by foundations, corporations, and through bequests) topped \$410 billion, up by about 5.2% from 2016, which, at that time, accounted for 2.1% of our gross domestic product. Indications are that our giving tendencies will continue to grow.

This is a lot of generosity, and we should be proud of the fact that we want to help our less fortunate brethren. But, picking up on Dr. Martin Luther King’s admonition above, we should be cognizant of why we need philanthropy and ask some hard questions about our giving tendencies. As a society, we need to ask *why* there continues to be poverty, hunger, disease, and disenfranchisement that *requires* charitable giving, *what systemic forces and structures of inequality* perpetuate these systems of disadvantage, and *how these systems can be dismantled so that everyone has equal access to resources*. As philanthropic-minded individuals with limited resources and energy, we need to ask *how* we can mitigate the suffering of our fellows *while continuing to work against the forces that reinforce that suffering*. This is where generosity and giving start getting difficult, as we encounter issues such as the persistent question of whether the public sector (government) or the private sector (philanthropy) is best equipped to tackle the immense

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<sup>1</sup> *Giving USA 2018: An Overview of Giving in 2017*. Chicago: Giving USA Foundation.

<sup>2</sup> “Charitable Giving Statistics.” National Philanthropic Trust, accessed 8-19-2018, <https://www.nptrust.org/philanthropic-resources/charitable-giving-statistics/>

social problems of our day. What does it mean when government gives tax breaks to foundations and individuals who support nonprofits? Is the government shifting its civic responsibility to the private sector? What kind of power does this give to these large charitable foundations and donors?

Even as individual philanthropists with limited resources, we run into challenging issues. For instance, what are our most pressing social problems when so much of society seems to be in distress? Are our relatively small donations enough to make a difference? Should we tell our recipients how to use our funds, attaching “strings” to our gift? How can we make sure our funds are used according to our wishes? How do we evaluate whether our gift not only makes a difference to our recipients but also whether it helps address the original problem we want to solve in the first place? In a nutshell, how do we know what the most *effective* way to spend our limited charitable resources is?

In this class, while keeping these questions in mind, we will engage philanthropy’s history, philosophy, theory, and critiques, as well as the practical aspects of strategic (or effective) philanthropy. Thanks to very generous gifts from The Philanthropy Lab and from Howard and Suellen Singer, not only will you have the opportunity to *learn* about philanthropy, but you will also have the opportunity to *experience* it as well, participating in the giving process and becoming part of a team that donates to a non-profit organization working to alleviate the social problem your team chooses to address. In this respect, your team will have the opportunity to act as a board of directors of a (fictional) philanthropic foundation, to research a social problem of your choice in New Orleans, to find non-profits that address that problem, and to donate funds to the non-profit that best fits your foundation’s mission and goals.

Giving away money—sounds like an easy class, doesn’t it? But we challenge you to think very seriously about the *difficulty involved in deciding how to give money away effectively*, as Aristotle noted (above). Moreover, we invite you to think about the *responsibility* involved in being a philanthropist – as John Rockefeller said, “Think of giving not only as a duty but as a privilege.” We hope that you find this class, and the opportunity to participate in the philanthropic process provided by our benefactors, to be a privilege and one of the most satisfying opportunities and responsibilities of your academic career. We hope, moreover, that it encourages you to make philanthropy an important part of the rest of your life.

## Required Readings

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 “Collins”)

Rob Reich, Chiara Cordelli, & Lucy Bernholz. 2016. *Philanthropy in Democratic Societies: History, Institutions, Values*. Chicago: University of Chicago Press. (hereafter “Reich”)

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 and philanthropic 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 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 papers 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 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 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 papers.

### **General Structure of the Course**

The course will be structured around three interwoven components: (1) academic; (2) experiential; and (3) class initiatives.

*Academic Component.* The academic component of the class will include lectures, videos/podcasts, readings, guest speakers, class discussion, and assignments designed to challenge students to think about the “big questions” (both from an individual and a social standpoint) of philanthropy. Much of the academic component of the course will involve the Tuesday class period, and students will be graded individually for this component. The academic component of the course is intended to stimulate critical student thinking about philanthropy, which will ultimately help in conducting the experiential component of the course.

*Experiential (Lab) Component.* The experiential (“Lab”) part of the class will include small group work, readings, agency site visits, and the hands-on development of a strategy for effectively distributing team funds. During the lab part of the course, students will get experience in learning how to develop mission and goal statements as a (fictional) foundation board, compare and evaluate non-profit organizations, all building toward a team funding decision. Readings and resources pragmatically oriented toward specific aspects of the philanthropic process will be included, and students will be encouraged to incorporate the critical thinking that they learn in the academic component of the class. Much of the lab part of the class will take place during the Thursday class period, and students will, for the most part, be graded as part of a team for this part of the course. We will also have guest speakers from time to time. 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. This portion of the course is made possible by very generous funding from The Philanthropy Lab and Howard and Suellen Singer.

At the end of the semester, the class 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 14, from 8 am to noon**. Attendance at the ceremony is mandatory (and it’s fun!).

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 our regular classroom, Room 316A, of Newcomb Hall. We plan to use most of these “Philanthropy Friday” morning class sessions

for guest speakers and for additional teamwork time. Please make sure that you take this additional class period into consideration when planning your class schedule—attendance will be taken at these sessions.

*Class Initiative Committees.* As we will discuss early in the semester, The Philanthropy Lab is presenting outstanding opportunities through various initiatives for class members to increase their learning experience and become more fully immersed in philanthropy. The third component of the course will involve setting up committees (not the same as the funding teams) to organize and set into motion fulfillment of the Philanthropy Lab initiatives and other initiatives to promote our course. Grading for this component of the class will be incorporated in students' class participation evaluation. We will discuss this component of the course in more detail in class.

## 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 14, 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 me 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!

## Title IX

Tulane University recognizes the inherent dignity of all individuals and promotes respect for all people. As such, Tulane is committed to providing an environment free of all forms of discrimination including sexual and gender-based discrimination, harassment, and violence like sexual assault, intimate partner violence, and stalking. If you (or someone you know) has experienced or is experiencing these types of behaviors, know that you are not alone. Resources and support are available: you can learn more at [titleix.tulane.edu](http://titleix.tulane.edu). Any and all of your communications on these matters will be treated as either "Confidential" or "Private" as

explained in the chart below. Please know that if you choose to confide in me I am mandated by the university to report to the Title IX Coordinator, as Tulane and I want to be sure you are connected with all the support the university can offer. You do not need to respond to outreach from the university if you do not want. You can also make a report yourself, including an anonymous report, through the form at [tulane.edu/concerns](http://tulane.edu/concerns).

Confidential	Private
<i>Except in extreme circumstances, involving imminent danger to one's self or others, nothing will be shared without your explicit permission.</i>	<i>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.</i>
<b>Counseling &amp; Psychological Services (CAPS)</b>   (504) 314-2277 or <b>The Line (24/7)   (504) 264-6074</b>	<b>Case Management &amp; Victim Support Services  </b> (504) 314-2160 or <a href="mailto:srss@tulane.edu">srss@tulane.edu</a>
<b>Student Health Center   (504) 865-5255</b>	<b>Tulane University Police (TUPD)   Uptown - (504) 865-5911. Downtown – (504) 988-5531</b>
<b>Sexual Aggression Peer Hotline and Education (SAPHE)   (504) 654-9543</b>	<b>Title IX Coordinator   (504) 314-2160</b> or <a href="mailto:msmith76@tulane.edu">msmith76@tulane.edu</a>

## Assignments and Grading:

### Specifically:

- 1. Various debates/exercises—in-class and homework (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 and “homework” exercises, that will draw from the course readings. These exercises may or may not be announced beforehand, so it is important that you regularly attend class. 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. Philanthropy Autobiography I – Due September 13 (5%)**

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. Philanthropy Autobiography II – Due December 14 (25%)**

This paper will give you the opportunity to “update” your personal philanthropic philosophy and plans, drawing on your experiences from having taken the class. It will also engage your “educated” opinions, with references from course materials, regarding several of the “big questions” and debates in philanthropy today. 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 – Due December 7 (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 18 and the completed final Briefing Book due December 7.

**6. Class participation and “Active” Attendance (15%)**

Students are expected to participate fully and thoughtfully in all class discussions and exercises, which means coming to class prepared 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. Your class participation grade will include an evaluation of your “class initiative committee” participation, discussed above.

**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; they will also be used to develop the briefing book that each team will produce after funding decisions have been made.

**Course Grading Criteria:**

Various debates/exercises:	5%
Philanthropy Autobiography I (due 9/13)	5%
Philanthropy Autobiography II (due 12/14)	25%
Team Presentation #1	5%
Team Presentation #2	10%
Team “Briefing Book” (due 12/7)	30%
Class participation (incl. committee participation):	15%
Team participation	<u>5%</u>
<b>Total</b>	<b>100%</b>

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Tentative Schedule  
SLAM 3060-01, Fall 2018  
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 ALSO NOTE: Unless otherwise indicated, readings should be done **for** the day on which they are listed.

**Week 1: What is Philanthropy?**

**August 28:** Introductions and Overview of the Class

- >>> Task (in-class): View documentary trailer for "What is Philanthropy?"  
<https://www.youtube.com/watch?v=qNgK7KnCEtM&feature=youtu.be>
- >>> Take Personality Test: <https://www.16personalities.com/> (10-12 min)

**August 30:** What is philanthropy? Why does New Orleans "need" philanthropy?

Readings:

- Lynn and Wisely, "Four Traditions of Philanthropy" (C)
- Zinsmeister, "A New 'Benevolent Empire' to Cure Social Maladies" (C)
- Remen, "In the Service of Life" (C)
- "Making New Orleans a Just and Resilient City" (C)
- New York Times: "10 Years After Katrina" (C)  
<https://www.nytimes.com/interactive/2015/08/26/us/ten-years-after-katrina.html>

- >>> **Task (in-class/before 8/31):** Take Philanthropy Lab Pre-Course survey
- >>> **Task for 8/31:** Research potential topics for foundation teams

**August 31: Philanthropy Friday:** Brainstorm and vote on issues; constitute foundation teams

**Week 2: Philanthropy and You**

**September 4:** Philanthropy and Personal Values: Why give?

Readings:

- Carnegie, from "The Gospel of Wealth" (C)
- Kelley, "There's No Such Thing as Bad Charity" (C)
- Leonhardt, "What Makes People Give?" (C)
- Hayakawa, "The Story of A-Town and B-Ville" (C)
- Barbusse, "The Eleventh" (C)
- The Payoff Podcast: Giving Back: Deciding to Donate & Choosing the Right Charity (link on Canvas)
- Tierney & Fleishman, "What are My Values and Beliefs?" (C)

- >>> **Task (in-class):** Singer, "The Why and How of Effective Altruism," TED Talk (video)

>>>> **Assignment Due: Reflection on Doing Good**

## September 6: Lab Day – Turning Individual Values into Team Values

Readings:

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

>>> **Team Task 1:** 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:** Decide on a name for your “foundation.”

>>> **Team Task 3:** 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 7: Philanthropy Friday: Grant Letter and Initiatives from Philanthropy Lab

>>> **Task:** Constitute “Class Initiative Committees”

>>> **Committee Task:** Meet your committee members, exchange contact information. Discuss committee task.

>>> **Team Task:** Continue working on Team Task 2 from September 6 if time permits.

## Week 3: Philanthropy, Inequality, and Social Justice

### September 11:

Readings:

- Collins, *Born on Third Base*, Preface, and Parts 1 and 2 (thru p. 55)
- Singer, “What Should a Billionaire Give—And What Should You?” (C)
- Cohen, “Philanthropy and the Role of Social Justice” (C)
- Jones, “Doors and Mirrors: Reflections on the Art of Philanthropy” (C)
- Burton & Barnes, “Shifting Philanthropy From Charity to Justice” (C)
- Juskalian, “Was Carnegie Right About Philanthropy?” (C)

### September 13: Lab Day – Problem Statement; Values Statement; Mission Statement; Theory of Change

Readings:

- Gary, *Inspired Philanthropy*, “Creating a Mission Statement.” (C)
- Radtke, “How to Write a Mission Statement” (C)
- Morariu, “Grantmakers’ Role in Theory of Change” (C)

Resources:

- Theory of Change youtube video: [https://www.youtube.com/watch?v=6zRre\\_qB6A4](https://www.youtube.com/watch?v=6zRre_qB6A4)
- Example of Theory of Change, youtube video: [https://www.youtube.com/watch?v=urU-a\\_FsS5Y](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 broadly hopes to achieve through its philanthropic efforts. Think about a theory of change that would guide your grantmaking.

>>> **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 20).

#### >>>> **Assignment Due 9/13: Philanthropy Autobiography I**

**September 14:** Philanthropy Friday

### **Week 4: Philanthropy in Practice: Ethics and Accountability**

**September 18:**

Readings:

- Ebrahim, "The Many Faces of Nonprofit Accountability" (C)
- "What is Social Sector Ethics?" Markkula Center for Applied Ethics at Santa Clara University <https://www.youtube.com/watch?v=xYTNWdmNiek> (C)
- "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>
- Greene, "Big Fund Hits a Nerve in Vermont,"
- Reich, "A Failure of Philanthropy." (C)
- Collins, *Born on Third Base*. Pp. 59-100.

**September 20:** Lab Day

Readings:

- Brest & Harvey, from *Money Well Spent* (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 21:** Philanthropy Friday

### **Week 5: History of Philanthropy / Emergence of Philanthrocapitalism**

**September 25**

Readings:

- Levy, "Altruism and the Origins of Nonprofit Philanthropy" (Reich)

- Zunz, “Why Is the History of Philanthropy Not a Part of American History?” (Reich)
- Reich, “On the Role of Foundations in Democracies” (Reich)
- Bishop and Green, “Philanthrocapitalism Rising” (C)
- Porter: “Why Business Can Be Good at Solving Problems” (link to YouTube video on Canvas)
- Edwards, “Has ‘Philanthrocapitalism’ Met Its Promise?” (C)
- Edwards, “Why Business Won’t Save the World” (link to YouTube video on Canvas)

### September 27: 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 28: Philanthropy Friday

## **Week 6: Dynamics of Giving I: Doing Due Diligence / Nonprofits Tell Their Story**

### **October 2:** Assessing Potential Recipients/Programs / Reading a Form 990

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 4:** 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#.VduoMvIhBc>

>>> **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 17** 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 5:** Philanthropy Friday

>>> **Team Task:** Finalize applications; email “applications for funding” to finalists.

### **Week 7: Dynamics of Giving II: Effectiveness and Evaluation**

**October 9:** Assessing Impact of Your Gift

Readings:

- Snibbe, “Drowning in Data” (C)
- Fitzsimmons, “Getting the Most out of Evaluation” (C)
- Brest & Harvey, “Assessing Progress and Evaluating Impact” from *Money Well Spent* (C)
- Additional readings TBA – stay tuned!

**October 11:** **NO CLASS – FALL BREAK!!**

**October 12:** **NO Philanthropy Friday**

### **Week 8: Team Presentations #1**

**October 16:**

>>>> Team Presentations #1

**October 18:**

>>> Team Presentations #1

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 19:** Philanthropy Friday

>>>> Guest Speaker: Site Visits

### **Week 9: SITE VISITS – No Class**

**October 23:** 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)

- Husock, “A Better Site Visit” (C)
- Minnesota Council on Foundations, “The Truth About Site Visits” (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 25:** Site visits – No Class

**October 26:** No Philanthropy Friday – continue with site visits

### **Week 10: Seeking Grants / Fundraising for Nonprofits**

**October 30:** Guest Speaker on Fundraising (TBA)

Readings:

- Readings TBA

**November 1:**

**>>> 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 2:** Philanthropy Friday

### **Week 11: Critiques of Philanthropy**

**November 6:**

Readings:

- Collins, Collins, *Born on Third Base*. Pp. 103-126.
- Beerbohm, “The Free-Provider Problem: Private Provision of Public Responsibilities” (Reich, pp. 207-225)
- Pevnick, “Philanthropy and Democratic Ideals” (Reich, pp. 226-243)
- Cordelli, “Reparative Justice and the Moral Limits of Discretionary Philanthropy” (Reich, pp. 244-265)
- Buffett, “The Charitable-Industrial Complex.” *New York Times*, July 26, 2013 (C)
- Buchanan, “On Peter Buffett’s Op-Ed.” (C)

**November 8:** 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 9:** Philanthropy Friday

### **Week 12: “New” Forms of Philanthropy**

**November 13:**

Readings:

- Horvath and Powell, “Contributory or Disruptive: Do New Forms of Philanthropy Erode Democracy?” (Reich, pp. 87-122)
- Madoff, “When Is Philanthropy? How the Tax Code’s Answer to This Question Has Given Rise to the Growth of Donor-Advised Funds and Why It’s a Problem” (Reich, pp. 158-177)
- Bernholz, “Creating Digital Civil Society: The Digital Public Library of America” (Reich, pp. 178-202)
- Elise Hu. October 14, 2014. How Millennials Are Reshaping Charity and Online Giving. National Public Radio. <http://www.npr.org/sections/alltechconsidered/2014/10/13/338295367/howmillennials-are-reshaping-charity-and-online-giving>
- Alessandra Stanley. October 31, 2015. Silicon Valley’s New Philanthropy. The New York Times. [http://www.nytimes.com/2015/11/01/opinion/siliconvalleys-newphilanthropy.html?\\_r=0](http://www.nytimes.com/2015/11/01/opinion/siliconvalleys-newphilanthropy.html?_r=0)
- Ron Lieber. Dec 23, 2016. United Way Searches for Its Place in a World of One-Click Giving. The New York Times. <https://www.nytimes.com/2016/12/23/your-money/united-way-searches-for-its-place-in-a-world-of-one-click-giving.html>

Resources:

- Fulton: TedTalk: “You are the Future of Philanthropy”; [https://www.ted.com/talks/katherine\\_fulton\\_you\\_are\\_the\\_future\\_of\\_philanthropy?language=en](https://www.ted.com/talks/katherine_fulton_you_are_the_future_of_philanthropy?language=en)

**November 15:** Lab Day: Decision Tools / Final Deliberations Begin

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 16: 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 Sarah.** Plan for team presentations.

**Week 13: Breathing Out**

**November 20:** Lab Day

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

**November 22:**

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

### **Week 14: Final Team Presentations**

**November 27:**

>>>> Team Presentations #2

**November 29:**

>>>> Team Presentations #2

**November 30:** Philanthropy Friday

### **Week 15: Philanthropy and You (Revisited)**

**December 4:** Team Presentations #2

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

**December 6:** Final Thoughts – You and Philanthropy

- Payton & Moody, *Understanding Philanthropy*, “Philanthropy, Democracy, and the Future,” (C)

**December 7:** Philanthropy Friday

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

### **Friday, December 14: Awards Ceremony (Final Exam Date)**

>>>> **No final exam, but Philanthropy Autobiography II due on course Canvas site by 11:59pm**

### **Awards Presentation**

**Friday, December 14 from 8:00 am until noon.**

This is when the fun starts – on Friday, December 14, from 8:00 am to noon, at a place to be announced, we will have a party where awards will be presented. **Attendance is mandatory at the awards presentation ceremony!**

**~~ Have a Wonderful Winter Break! ~~**