

Course Information

BUSN 432-500,501; Strategic Philanthropy

3 Credit Hours

Spring 2021

MEETING TIME: 500- MWF 12:00-12:50 501- MWF 1:35-2:25

LOCATION: Wehner 182 and (as needed) Zoom - 365 553 5530

Instructor Details

MEETING TIME AND LOCATION:

INSTRUCTOR: Kyle Gammenthaler, Professor and Manager of Social Impact Programs

LOCATION: Wehner 182 and (as needed) Zoom - 365 553 5530

OFFICE HOURS: TBD Please make an appointment by contacting me directly at kyleg@tamu.edu

Course Description

From the Ancient Greeks to Andrew Carnegie to Bill Gates, philanthropic leaders have taken on communities' social problems for many generations. Not until recently has this idea of philanthropy been formalized into a strategic approach to change the world. Foundations, both community based or corporate, serve as a model for making effective philanthropic decisions. The tenets and principles found in these organizational structures easily translate into the individual giver's decision making processes as well. Contrary to popular belief, philanthropy does not simply pertain to individuals and organizations with millions and billions of dollars. We each have time, talent, and treasure that can be used wisely in an effort to better our society. At the core, effective use of these resources makes you and I philanthropic leaders.

Throughout the course, you will have the opportunity to make philanthropic grant decisions because of the generous contributions, from The Philanthropy Lab and Aggieland Credit Union, to nonprofits located in the Brazos Valley. In this capacity, you will learn how to research, evaluate, and select nonprofits for investment, as well as how to measure and assess the impact of grant dollars.

Course Prerequisites

Acceptance into course through application process.

Course Learning Outcomes

This course allows the student to blend academic knowledge with practical experience by learning from required assignments, personal reflection and invited guest speakers. By the end of the course, the student can expect to:

1. **Defend a personal philanthropic ethic that takes serious account of how one's time, talent, and treasure might benefit the public good.**
 1. Understand how an inclusive mindset can be applied as a strategic philanthropic practice.
 2. Understand how a social impact mindset can be developed as one notices a problem, learns more, and finds opportunities to act.
2. **Describe the nature of philanthropy and how it operates in a community setting.**
3. **Participate in the philanthropic process**
 1. Identify opportunities to utilize diversity and inclusion as tools within the philanthropic process.
 2. Develop critical thinking skills by engaging with local nonprofit organizations, evaluating the organizations, and determining effective decisions-making strategies with student peers.
4. **Improve written and oral communication in the form of reflection and presentations.**

Textbook and/or Resource Materials

(SG) *The Essence of Strategic Giving: A Practical Guide for Donors and Fundraisers* by Peter Frumkin (available through TAMU Library)

(MWS) *Money Well Spent: Second Edition* (available through TAMU Library)

(GDR) *Good Giving Done Right* (purchase)

Just Mercy by Bryan Stevenson (purchase)

Various additional readings posted on eCampus

Grading Policy

GRADING POLICY:

Class Engagement **100 points**

Reading Checks **50 points**

Book Report **100 points**

Process Reflections **200 points**

Philanthropic Autobiography **100 points**

Giving Goal Submission **50 points**

Group Grantmaking Documents **200 points**

Final Presentations **200 points**

1000 total points

ASSIGNMENTS:

- I. **Participation/Attendance (Individual and Group):** Discussion is an integral component to your success in this course. All of your classmates, and myself, have much to learn from your own experiences. I expect you to be **present, prepared, engaged, and contributing to discussions** in either small group discussions, whole class discussions or both. In the case of university-excused absence, I will provide an alternative assignment to demonstrate the “engaged and contributing” part of participation.
- II. **“The Other Side” Book Report:** Throughout the semester, you will read *Just Mercy: A Story of Justice and Redemption* by Bryan Stevenson and write a 800-1000 word reflection. The rubric and guiding questions can be found on eCampus: **Due March 28th**
- III. **Process Reflections:** You are expected to keep a journal of your thoughts and experiences throughout the entire class. I want you to see how your mindset and approach to philanthropy changes as the semester progresses. Your entry could be in response to a reading from class, a change in mindset, a response to a difficult situation, or anything else that gives a glimpse into your experience. You are required to submit 7 total entries that span the entire semester. There is no specific length for each entry, but each entry should be at least a page of double spaced writing. **During the semester, I will ask for journal entries that we could use as blog posts to share our experience with the Mays Business School and Texas A&M community.**
 - I. **Due Dates**
 - I. **Process Reflections 1 & 2 - February 5th**
 - II. **Process Reflections 3 & 4 - March 5th**
 - III. **Process Reflection 5 (specific prompt on Canvas) - April 18th**
 - IV. **Process Reflections 6 & 7 - May 5th**
- IV. **Philanthropic Autobiography:** Based on our class discussions, readings, and out of class experiences, please write a 500 word statement on how you plan to best use your time, talent and treasure. What are your philanthropic goals and how do you plan to enact them in your daily life? What drives and motivates you to be a philanthropist? **Due May 5th**
 - I. **Giving Goal Submission: more details will be provided in class - Due May 5th**
- V. **Group Grantmaking Process:** The group assignments make up the bulk of the coursework and will be explained in greater detail on eCampus and in class.

- I. **Due Diligence:** Students will conduct their due diligence on 2 of the final 10 nonprofits. Through extensive research, interviews with CEO and/or key staff at the nonprofit, and site visits, the group will assist in compiling grant proposals for the chosen organizations. The nonprofit's needs and desires will guide the editing of these proposals. Therefore, it is important to have clear dialogue with the nonprofit. More details and guidelines on this written document will be explained further in class. **Due April 4th**

- I. ***This includes interview notes/transcript, "site visit" notes and reflection, and final grant proposals.***

VI. **Presentations:**

- I. The third and final component of each group's grantmaking process is to present both of the nonprofit organization proposals to their fellow board members/peers. These presentations are meant to communicate your findings to your fellow board members and provide insights on your recommendation(s) for funding. Your group is expected to provide clear outcomes on what the money would achieve. Each group will give 2 separate 15 minute presentations with 5 minutes of Q/A. **Due April 5, 7, 9, 12, 14, 16**

VII. **Final Decision Discussion:**

- I. The course culminates in the students acting as a board of directors to debate and discuss how the funding should be distributed. This is a crucial component to the class and should be approached with the utmost responsibility by each student. As a class, you will come to a collective decision on where the money is to be distributed. Some of the presented organizations will receive funding, some may not, and others may receive a different amount than asked for. This is all perfectly acceptable as this is how decisions are made on a foundation level. As a class, you will narrow down your list of nonprofits and associated dollar amount(s) over the span of 3 class periods. Once the decision is made, notification will be sent to the awarded recipients and to those not awarded funding. The only rules are that at least 2 nonprofits should be chosen as recipients and you can't just simply split the money evenly across the organizations. These are tough decisions, but the material and classes leading up will prepare you for this experience. **Due to the importance of these final meetings, unexcused absences during this time will drop your final grade by one letter grade for each missed class. April 19, 21, 23**

Late Work Policy

All assignments must be completed before the beginning of the class on which the assignment is due unless you have an excused absence as described under attendance policy.

Given the structured nature of the class, late work is unacceptable and unproductive. However, I do understand that working with nonprofit partners brings some unique challenges in accomplishing certain tasks. If you are having any issues completing an assignment on time, please let me know as early as possible so that we can figure out the best course of action.

Course Schedule

Date		
Week 1		1. Watch: Bill Gates Commencement Address:
Class 1 - January 20th	Introductions and Overview of Semester - \$10 Activity	https://www.youtube.com/watch?v=zPx5N6Lh3sw - Friday
Class 2 - January 22nd	Introductions cont. - Relationship Building	2. Watch: What is Philanthropy?: https://www.youtube.com/watch?v=qNgK7KnCEtM&feature=youtu.be - Friday 3. GDR - Introduction - Friday
Week 2		
Class 1 - January 25th	What are Nonprofits?	1. Read: Nonprofits in the United States (22 pages) - Monday
Class 2 - January 27th	\$10 Activity Debrief	2. Read: GDR - Chapter 1: Nonprofits and Their Unsung American Heroes (24 Pages) - Wednesday
Class 3 - January 29th	How has philanthropy changed?	3. Skim: Understanding Philanthropy - Chapter and 2 (61 pages) - Friday
Week 3		
Class 1 -Feb. 1st	What are some of the past and present voices of philanthropy? Strategic Philanthropy	1. Read: Andrew Carnegie, Gospel of Wealth - Monday 2. Read: Darren Walker, Toward a New Gospel of Wealth - Monday
Class 2 - Feb 3rd	How is philanthropy formalized in society? (Role of foundations)	3. Read: The problem with Jeff Bezos's \$2 billion gift to charity - Monday 4. Read: Mackenzie Bezos Philanthropy - https://www.google.com/amp/s/marker.medium.com/amp/p/21952a3dc811
Class 3 - Feb 5th	Strategic Philanthropy	4. Read: Philanthropy Hall of Fame (Choose 3 from 19th and 20th century) - https://www.philanthropyroundtable.org/almanac/people/hall-of-fame - Monday

		6. SG - The Idea of Strategic Giving (26 pages) - Wednesday/Friday 7. GDR - Chapters 3 and 4 (43 pages) - Wednesday/Friday
Week 4		
Class 1 - Feb. 8th	Mock Grant Activity (without context on purpose)	1. Mock Grant Applications (Monday)
Class 2 - Feb 10th	Mock Grant Debrief	2. Community Demographic Reading - Friday
Class 3 - Feb 12th	No Class - Overview of Brazos Valley Community Reading	3. ALICE Simulator - http://texas.makingtoughchoices.org/ 4. https://www.unitedforalice.org/texas
Week 5		
Class 1 - Feb 15th	What is a good due diligence process?	1. MWS - Chapter 8: Inviting Proposals and Conducting Due Diligence (19 pages) - Monday
Class 2 - Feb 17th	Nonprofit Strategy Questions	2. GDR - Chapter 5: Essential Partners Selecting and Working with Nonprofits (28 pages) - Monday
Class 3 - Feb 19th	Inclusive Mindset w/ Dr. Nancy Hutchins via Zoom	3. La Piana Consulting, Due Diligence Done Well: A Guide for Grantmakers (Canvas) - Monday 4. Light Touch Approach: https://www.bridgespan.org/insights/library/philanthropy/nonprofit-due-diligence-donor-decision-tool/how-to-research-a-nonprofit-light-touch-approach 5. North Star Case Study - Wednesday 6. Power of theories of change (Canvas) - Wednesday
Week 6		
Class 1 - Feb 22nd	Nonprofit Leadership Questions	1. Toxic Leadership Case Study - Monday
Class 2 - Feb 24th	Nonprofit Finance Questions	2. Nonprofit Leadership Reading - Monday
Class 3 - Feb 26th	TBD	3. Form 990 Tutorial -

		<p>Wednesday</p> <p>4. Watch Ted Pallota Ted Talk “The Way We Think About Charity is Dead Wrong” http://www.ted.com/talks/dan_pallotta_the_way_we_think_about_charity_is_dead_wrong - Wednesday</p>
Week 7		
Class 1 -March 1st	Board Meeting - Narrow Down	1. Grant Applications and Scoring - Monday
Class 2 - March 3rd	Board Meeting - Narrow Down	
Class 3 - March 5th	Group Expectations	
Week 8		
Class 1 - March. 8th	What are some frameworks for philanthropy? (motivations)	1. Listen to “I Was Just Trying to Help,” This American Life, episode 503 (MAYBE THE WHOLE THING?) (starting at 06:15 through 33:36 – part of Act One) (available from: http://www.thisamericanlife.org/radioarchives/episode/503/i-was-just-trying-to-help) - Monday
Class 2 - March 10th	What are some of the shortcomings and challenges of philanthropy? When philanthropy fails...	
Class 3 - March 12th	Guest Speaker - Aggieland Credit Union via Zoom	<p>2. Peter Singer, “The Why and How of Effective Altruism”, TedX Conference (2013)(available from: https://www.ted.com/talks/peter_singer_the_why_and_how_of_effective_altruism) - Monday</p> <p>3. Schervish, Paul G. "Major donors, major motives: The people and purposes behind major gifts." - Monday</p> <p>Class Discussion Groups: Zuckerberg Philanthropy Case: Future Perfect (podcast), 2019. “Move Fast and Break Schools.” and two other articles on Google Drive Philanthropy and Democracy: Against Philanthropy /</p>

		Philanthropy and a Democratic Society
Week 9		
Class 1 - March 15th	Personal Values/Giving Goal/Philanthropy Lab Staff	1. Separate students into small groups to pre-research philanthropy in other cultures/countries/contexts. - Wednesday
Class 2 - March 17th	International Philanthropy	
Class 3 - March 18th (redefined Friday Classes)	Site Visits	
Week 10		
Class 1 - March 22nd	Site Visits	Shifting from Charity to Justice, SSIR, Finish Site Visits
Class 2 - March 24th	Site Visits	
Class 3 - March 26th	Guest Speaker - Virtual panel w/ Jason Penry and Chastity Carrigan	
Week 11		
Class 1 - March 29th	Just Mercy Discussion	1. Just Mercy Discussion Plan 2. MWS - Chapter 9
Class 2 - March 31st	Common Tension Points in Decision Making - ST/LT, O/P, M2L/L2M Debate	
Class 3 - April 2nd	Former Student Grant Evaluation Presentation	
Week 12		
Class 1 - April 5th	Presentations - 2 groups (15 minute presentation and 5 minute Q/A)	1. Presentation Prep
Class 2 - April 7th	Presentations - 2 groups (15 minute presentation and 5 minute Q/A)	
Class 3 - April 9th	Presentations - 1 group (15 minute presentation and 5 minute Q/A)	
Week 13		
Class 1 - April 12th	Presentations - 2 groups (15 minute presentation and 5 minute Q/A)	1. Presentation Prep
Class 2 - April 14th	Presentations - 2 groups (15 minute presentation and 5 minute Q/A)	

Class 3 - April 16th	Presentations - 1 group (15 minute presentation and 5 minute Q/A) - Possibly via Zoom	
Week 14		
Class 1 - April 19th	Final Decisions	1. Reread Grant Proposals and Final Scoring
Class 2 - April 21st	Final Decisions	
Class 3 - April 23rd	Final Decisions	
Class 4 - TBD 1-1.5 hours	Extra Decision Time	
Week 15		
Class 1 - April 26th	Class Debrief and Measuring Success	GDR: Chapter 6
Class 2 - April 28th	Google Doc for Measuring Success and Evaluation	

University Policies

Attendance Policy

The university views class attendance and participation as an individual student responsibility. Students are expected to attend class and to complete all assignments.

Please refer to [Student Rule 7](#) in its entirety for information about excused absences, including definitions, and related documentation and timelines.

Makeup Work Policy

Students will be excused from attending class on the day of a graded activity or when attendance contributes to a student's grade, for the reasons stated in Student Rule 7, or other reason deemed appropriate by the instructor.

Please refer to [Student Rule 7](#) in its entirety for information about makeup work, including definitions, and related documentation and timelines.

Absences related to Title IX of the Education Amendments of 1972 may necessitate a period of more than 30 days for make-up work, and the timeframe for make-up work should be agreed upon by the student and instructor” ([Student Rule 7, Section 7.4.1](#)).

“The instructor is under no obligation to provide an opportunity for the student to make up work missed because of an unexcused absence” ([Student Rule 7, Section 7.4.2](#)).

Students who request an excused absence are expected to uphold the Aggie Honor Code and Student Conduct Code. (See [Student Rule 24](#).)

Academic Integrity Statement and Policy

“An Aggie does not lie, cheat or steal, or tolerate those who do.”

“Texas A&M University students are responsible for authenticating all work submitted to an instructor. If asked, students must be able to produce proof that the item submitted is indeed the work of that student. Students must keep appropriate records at all times. The inability to authenticate one’s work, should the instructor request it, may be sufficient grounds to initiate an academic misconduct case” ([Section 20.1.2.3, Student Rule 20](#)).

You can learn more about the Aggie Honor System Office Rules and Procedures, academic integrity, and your rights and responsibilities at aggiehonor.tamu.edu.

Americans with Disabilities Act (ADA) Policy

Texas A&M University is committed to providing equitable access to learning opportunities for all students. If you experience barriers to your education due to a disability or think you may have a disability, please contact Disability Resources in the Student Services Building or at (979) 845-1637 or visit disability.tamu.edu. Disabilities may include, but are not limited to attentional, learning, mental health, sensory, physical, or chronic health conditions. All students are encouraged to discuss their disability related needs with Disability Resources and their instructors as soon as possible.

Title IX and Statement on Limits to Confidentiality

Texas A&M University is committed to fostering a learning environment that is safe and productive for all. University policies and federal and state laws prohibit gender-based discrimination and sexual harassment, including sexual assault, sexual exploitation, domestic violence, dating violence, and stalking.

With the exception of some medical and mental health providers, all university employees (including full and part-time faculty, staff, paid graduate assistants, student workers, etc.) are Mandatory Reporters and must report to the Title IX Office if the employee experiences, observes, or becomes aware of an incident that meets the following conditions (see [University Rule 08.01.01.M1](#)):

- The incident is reasonably believed to be discrimination or harassment.
- The incident is alleged to have been committed by or against a person who, at the time of the incident, was (1) a student enrolled at the University or (2) an employee of the University.

Mandatory Reporters must file a report regardless of how the information comes to their attention – including but not limited to face-to-face conversations, a written class assignment or paper, class discussion, email, text, or social media post. Although Mandatory Reporters must file a report, in most instances, a person who is subjected to the alleged conduct will be able to control how the report is handled, including whether or not to pursue a formal investigation. The University’s goal is to make sure you are aware of the range of options available to you and to ensure access to the resources you need.

Students wishing to discuss concerns in a confidential setting are encouraged to make an appointment with [Counseling and Psychological Services \(CAPS\)](#).

Students can learn more about filing a report, accessing supportive resources, and navigating the Title IX investigation and resolution process on the University’s [Title IX webpage](#).

Statement on Mental Health and Wellness

Texas A&M University recognizes that mental health and wellness are critical factors that influence a student’s academic success and overall wellbeing. Students are encouraged to engage in healthy self-care by utilizing the resources and services available from Counseling & Psychological Services (CAPS). Students who need someone to talk to can call the TAMU Helpline (979-845-2700) from 4:00 p.m. to 8:00 a.m. weekdays and 24 hours on weekends. 24-hour emergency help is also available through the National Suicide Prevention Hotline (800-273-8255) or at suicidepreventionlifeline.org.

COVID-19 Temporary Addendum to Minimum Syllabus Requirements

The Faculty Senate temporarily added the following statements to the minimum syllabus requirements in Spring 2021 as part of the university’s COVID-19 response.

Campus Safety Measures

To promote public safety and protect students, faculty, and staff during the coronavirus pandemic, Texas A&M University has adopted policies and practices for the Spring 2021 academic term to limit virus transmission. Students must observe the following practices while participating in face-to-face courses and course-related activities (office hours, help sessions, transitioning to and between classes, study spaces, academic services, etc.):

- Self-monitoring—Students should follow CDC recommendations for self-monitoring. **Students who have a fever or exhibit symptoms of COVID-19 should participate in class remotely if that option is available, and should not participate in face-to-face instruction.**

- Face Coverings—Face coverings must be properly worn in all non-private spaces including classrooms, teaching laboratories, common spaces such as lobbies and hallways, public study spaces, libraries, academic resource and support offices, and outdoor spaces where 6 feet of physical distancing is difficult to reliably maintain. Description of face coverings and additional guidance are provided in the [Frequently Asked Questions \(FAQ\)](#) available on the [Provost website](#).
- Physical Distancing—Physical distancing must be maintained between students, instructors, and others in course and course-related activities.
- Classroom Ingress/Egress—Students must follow marked pathways for entering and exiting classrooms and other teaching spaces. Leave classrooms promptly after course activities have concluded. Do not congregate in hallways and maintain 6-foot physical distancing when waiting to enter classrooms and other instructional spaces.
- To attend a face-to-face class, students must properly wear an approved face covering. If a student refuses to wear a face covering, the instructor should ask the student to leave and join the class remotely. If the student does not leave the class, the faculty member should report that student to the [Student Conduct office](#) for sanctions. Additionally, the faculty member may choose to teach that day's class remotely for all students, or dismiss the class in the case of a traditional face to face lecture.

Personal Illness and Quarantine

Students required to quarantine must participate in courses and course-related activities remotely, if that option is available, and **must not attend face-to-face course activities**. Students should notify their instructors of the quarantine requirement. Students under quarantine are expected to participate in courses and complete graded work unless they have symptoms that are too severe to participate in course activities.

Students experiencing personal injury or illness that is too severe for the student to attend class qualify for an excused absence (See [Student Rule 7, Section 7.2.2.](#)) To receive an excused absence, students must comply with the documentation and notification guidelines outlined in Student Rule 7.

College and Department Policies

Statement on Inclusion

Texas A&M University is committed to enriching the learning and working environment for all visitors, students, faculty, and staff by promoting a culture that embraces inclusion, diversity, equity, and accountability. Diverse perspectives, talents, and identities are vital to accomplishing our [mission](#) and living our [core values](#).

The following resources are available to support you in promoting an inclusive culture:

- [Stop Hate Website](#) – Report hate/bias incidents
- [TAMU Office for Diversity Resources](#)

- [Department of Multicultural Services](#) – Educational/developmental programs to foster inclusion
- [Counseling and Psychological Services](#) – Support for mental health and emotional well-being

Mays Food & Beverage Policy with Temporary COVID-19 Amendment

We have beautiful and state-of-the-art classrooms in the Wehner Building and Cox Hall. We want to maintain the high quality of these classrooms for the students in future years. Thus, it is necessary for you to adhere to the established policy of no beverages, food, tobacco products, or animals (unless approved) within the classrooms.

Further, for the safety of our campus community, while COVID-19 protocols are in place, eating and drinking in university teaching classrooms are not allowed.

Eating and drinking should be limited to designated dining areas, one's dorm room, or outside while maintaining physical distancing of 6 feet or greater from others.

Please hydrate well before class. If someone needs to hydrate for health reasons, they can briefly leave the class, hydrate, and return.