

SYLLABUS
BUSN 432-501; Strategic Philanthropy
3 Credit Hours
SPRING 2020

MEETING TIME AND LOCATION: MW 9:35-10:50 - Wehner 106

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

OFFICE: 242B Wehner

OFFICE: HOURS: As needed. 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 very core, effective use of these resources makes you and me a philanthropic leader.

Through the course of this semester each student will not only learn about strategic giving, but practice it. The Philanthropy Lab and Aggieland Credit Union have all generously provided \$35,000 to our class so that we can distribute it to local nonprofit organizations. We will join classrooms across the country at Stanford, University of Michigan, University of Texas, and Penn State as we engage in this innovative approach to giving. Students, operating as a foundation's board of directors, will determine the mission and objective of the funding based on students' values; the organization(s) to which funding will be allocated; the number of and size of the gift(s) that will be made; how the gift(s) will be awarded; and how the impact of the gift(s) will be evaluated and assessed.

To best accomplish this task, we will hear from multiple philanthropic leaders, engage in vibrant classroom discussions, and experience a unique process that is the first of its kind at Texas A&M. While much of the semester will operate in team settings, a primary goal for you as an individual, is to learn about how you can best respond to community needs as a philanthropic leader. Whether you have \$1, \$1,000,000, or 5 hours to volunteer on a Saturday afternoon, you will examine and further develop your own personal philanthropic autobiography. It is my hope that you leave this class with a comprehensive understanding of the intricacies of philanthropy and the nonprofit sector and a personal plan to engage this sector in the future.

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.
2. Describe the nature of philanthropy and how it operates in a community setting.

3. Participate in the philanthropic process: establish goals, perform due diligence, write and evaluate proposals, participate in discussions that will persuade, debate merits, and reach collective funding decisions.
4. Improve written and oral communication in the form of grantwriting and presentations.

REQUIRED TEXTS:

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

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

Just Mercy by Bryan Stevenson

Various additional readings posted on eCampus

PREREQUISITES: None

EXPECTATIONS:

- I. Expectations of the instructor
 - a. Organized class lessons that incorporate a variety of learning strategies.
 - b. Assignments and experiences designed to crystalize concepts/topics covered in class.
 - c. Availability inside and outside of the classroom.
 - d. Respect at all times.
- II. Expectations of the student
 - a. Be present mentally during the class period.
 - b. Assume the responsibility for your learning.
 - c. Timely completion of assignments and readings.
 - d. Willingness to share opinions with the class as a whole.
 - e. Consideration for others opinions and beliefs.
 - f. Respect at all times.

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 thoughts and experiences. Occasionally, we will have guest speakers from outside of Mays Business School attend our class. You are expected and encouraged to engage the speaker in dialogue and ask questions. As always, please respect the opinions of any member of our classroom community.
 - i. Reading Quizzes: Due to the discussion based nature of the course, reading is critical. Throughout the semester, there will be 5 reading quizzes. These will take place at the beginning of the class. I will take the highest 3 grades regardless of circumstances.
- 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 18th**
- 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. *May 1st*

- 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 1st***
- 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.
- a. **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 March 29th***
- b. **Presentations:** 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 convince your peers that this option deserves funding. Your group is expected to provide clear outcomes on what the money would achieve. Each group will give 2 separate presentations over the span of two weeks and will have time to engage in Q/A after each presentation. ***Due March 30th, April 1st, April 6th, April 8th***
- VI. **Final Debate:** 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 2 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. *Due April 13th and April 15th***

GRADING POLICY:

Class Engagement	100 points	A: 895 points or higher
Reading Checks	50 points	B: 795-894 points
Book Report	150 points	C: 695-794 points
Process Reflections	200 points	D: 595-694 points
Philanthropic Autobiography	100 points	F: Below 595 points.
Briefing Booklet	200 points	
Final Presentations	200 points	

1000 total points

eCampus

I use eCampus to post much of the relevant information for this course, including the important dates, reading assignments, and instructions for the paper assignments. Students are expected to submit their assignments and papers via the designated assignment drop boxes on eCampus.

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.

ATTENDANCE POLICY

Students are expected to attend unless there is an unexcused absence. Excessive absences (both excused and unexcused) will be addressed on an individual basis with the professor. Please see below for more information regarding the make-up policy and Student Rule 7 (<http://student-rules.tamu.edu/rule07.htm>).

Make-up Policy:

If an absence is excused, the instructor will either provide the student an opportunity to make up any quiz, exam or other work that contributes to the final grade or provide a satisfactory alternative by a date agreed upon by the student and instructor. If the instructor has a regularly scheduled make up exam, students are expected to attend unless they have a university approved excuse. The make-up work must be completed in a timeframe not to exceed 30 calendar days from the last day of the initial absence.

The reasons absences are considered excused by the university are listed below. See Student Rule 7 for details (<https://student-rules.tamu.edu/rule07/>). The fact that these are university-excused absences does not relieve the student of responsibility for prior notification and documentation. Failure to notify and/or document properly may result in an unexcused absence. Falsification of documentation is a violation of the Honor Code.

- 1) Participation in an activity that is required for a class and appears on the university authorized activity list at <https://studentactivities.tamu.edu/app/sponsauth/index>
- 2) Death or major illness in a student's immediate family.
- 3) Illness of a dependent family member.
- 4) Participation in legal proceedings or administrative procedures that require a student's presence.
- 5) Religious holy day. NOTE: Prior notification is NOT required.

- 6) Injury or illness that is too severe or contagious for the student to attend class.
 - a) Injury or illness of three or more class days:

Student will provide a medical confirmation note from his or her medical provider within one week of the last date of the absence (see Student Rules 7.1.6.1)
 - b) Injury or illness of less than three class days:

Student will provide one or both of these (at instructor's discretion), within one week of the last date of the absence: (i.) Texas A&M University Explanatory Statement for Absence from Class form available at <http://attendance.tamu.edu> or (ii.) Confirmation of visit to a health care professional affirming date and time of visit.
- 7) Required participation in military duties.
- 8) Mandatory admission interviews for professional or graduate school which cannot be rescheduled.
- 9) Mandatory participation as a student-athlete in NCAA-sanctioned competition.
- 10) In accordance with Title IX, pregnancy and related conditions for a time deemed medically necessary by the student's physician.
- 11) Mandatory interviews for permanent, full-time internships provided that the interviews are fixed date by employer and cannot be rescheduled (maximum 1 absence per scheduled class each academic term).

Other absences may be excused at the discretion of the instructor with prior notification and proper documentation. In cases where prior notification is not feasible (e.g., accident or emergency) the student must provide notification by the end of the second working day after the absence, including an explanation of why notice could not be sent prior to the class.

Americans with Disabilities Act (ADA) Policy Statement:

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 <http://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.

Academic Integrity Statement and Policy:

Aggie Honor Code

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

Upon accepting admission to Texas A&M University, a student immediately assumes a commitment to uphold the Honor Code, to accept responsibility for learning and to follow the philosophy and rules of the Honor System. Ignorance of the rules does not exclude any member of the Texas A&M University

community from the requirements or the processes of the Honor System. For additional information please visit <http://aggiehonor.tamu.edu/>. On course work, assignments, and examinations at Texas A&M University, you may be asked to sign the following Honor Pledge:

“On my honor, as an Aggie, I have neither given nor received unauthorized aid on this academic work.”

Mays Food & Beverage Policy

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. Bottled water is permitted. Your assistance is greatly appreciated.

Detailed Class Schedule and Reading List

Week 1

- **January 13th**– Class Introductions and Overview of Semester
 - Bill Gates Commencement Speech (**Watch in Class**)
(<http://news.harvard.edu/gazette/story/2007/06/remarks-of-bill-gates-harvard-commencement-2007/>) or (<https://www.youtube.com/watch?v=zPx5N6Lh3sw>)
- **January 15th**– Nonprofit Context
 - A Primer on Nonprofit Organizations (**eCampus**)

Week 2

- **January 20th NO CLASS**
 - Suggested Reading: Martin Luther King Jr. 's Letter from Birmingham Jail
- **January 22nd**
 - What is Philanthropy?
 - Understanding Philanthropy pp. 1-61 (**eCampus**)
 - We Make a Life By What We Give pp. 1-18
 - Peter Singer, *What Should a Billionaire Give – And What Should You?*
(http://www.nytimes.com/2006/12/17/magazine/17charity.t.html?pagewanted=all&_r=1&)

Week 3

- **January 27th** – Historical and Current Philanthropic Landscape
 - Andrew Carnegie, *Gospel of Wealth* (**eCampus**)
 - Darren Walker, *Toward a New Gospel of Wealth* (**eCampus**)
 - Philanthropy Hall of Fame Bios (Choose 3 from 19th and 20th century)
http://www.philanthropyroundtable.org/almanac/hall_of_fame/
- **January 29th** - Why People Give?
 - David Leonhardt, *What Makes People Give?*
(<http://www.nytimes.com/2008/03/09/magazine/09Psychology-t.html?pagewanted=all>)
 - Understanding Philanthropy pp. 62-95 (**eCampus**)

- Chapter 4 in Strategic Giving - (SG)

Week 4

- **February 3rd**– Strategic Philanthropy and Role of the Foundation
 - Chapter 1 *Idea of Strategic Giving* - (SG)
 - Chapters 1 and 2 *Money Well Spent (MWS)*
 - Skim - Chapters 16 and 17 of *Money Well Spent (MWS)*
- **February 5th - Evaluating Sample Proposals**
 - Mock Grant Activity (eCampus)

Week 5

- **February 10th** – Strategic Philanthropy and Due Diligence
 - Chapters 3 and 4 *Money Well Spent (MWS)*
 - La Piana Consulting, *Due Diligence Done Well: A Guide for Grantmakers* (eCampus)
 - Four Dating Tips to Sustain Strong Grantmaker-Grantee Relationships (eCampus)
- **February 12th - Evaluating Nonprofit Leadership**
 - Toxic Leadership Case Study (eCampus)

Week 6

- **February 17th- Proposal Scoring Day**
 - Grant Materials (eCampus)
- **February 19th - Board Meeting to move to 10 organizations**
 - Grant Applications and Score Comments (eCampus)

Week 7

- **February 24th - Evaluating Nonprofit Strategy**
 - Strategic Decision Making Excerpt (eCampus)
 - Setting Strategy: Finding Your Organization's North Star Case (eCampus)
 - Chapter 3 Strategic Giving - Logic Models: Theories of Change, Leverage, and Scale (SG)
- **February 26th - Evaluating Nonprofit Finances**
 - 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_wron](http://www.ted.com/talks/dan_pallotta_the_way_we_think_about_charity_is_dead_wrong)
[g](http://www.ted.com/talks/dan_pallotta_the_way_we_think_about_charity_is_dead_wron)
 - Form 990 Tutorial (<https://learn.guidestar.org/help/tutorials#general>)

Week 8

- **March 2nd** – Understanding the Challenges
 - SSIR, Failure of Philanthropy (eCampus)
 - *Central Problems in Philanthropy: Effectiveness, Accountability, and Legitimacy* - (eCampus)

- **March 4th**– Personal Philanthropic Autobiography
 - Tierney & Fleishman, “What Are My Values and Beliefs”, pp. 21-48 (eCampus)

Week 9: SPRING BREAK

Week 10

- **March 16th**- Common Issues Debate
 - Chapter 9 Money Well Spent (MWS)
 - Short Term vs. Long Term
 - Operational vs. Programmatic
 - More to Less vs. Less to More
- **March 18th**- Book Discussion
 - Shifting from Charity to Justice, SSIR (eCampus)

Week 11

- **March 23rd**– Site Visit Workday
- **March 25th**– TENTATIVE GUEST SPEAKER

Week 12

- **March 30th**- Board Presentations (3 Groups)
- **April 1st**- Board Presentations (2 Groups)

Week 13

- **April 6th** – Board Presentations (3 Groups)
- **April 8th**– Board Presentations (2 Groups)

Week 14

- **April 13th** – Final Decision
- **April 15th** - Final Decisions

Week 15

- **April 20th** – Flex Day
- **April 22nd**- Measuring Success
 - Understanding Philanthropy, pp 96-130 (eCampus)

Week 16

- **April 27th** – Course Reflection
- **May 4th** - Check Presentation from 5:00-7:30pm (more details to come!)