

**MGMT 440.01**  
**STRATEGIC PHILANTHROPY**  
**SYLLABUS – FALL 2018**  
**M 3:00 – 5:50 PM, COBA ROOM 316 / 3 CREDIT HOURS**

---



**GRIGGS CENTER**  
FOR ENTREPRENEURSHIP & PHILANTHROPY

*To educate students for Christian service and leadership throughout the world. (ACU Mission)*

*To glorify God by creating a distinctively Christian environment in which excellent teaching, combined with scholarship, promotes the intellectual, personal, and spiritual growth of business students, and educates them for Christian service and leadership throughout the world. (ACU COBA Mission)*

*To explore God's design for the stewardship of resources, both time and money, for Kingdom purposes. To ignite and accelerate the joy of giving and provide meaningful opportunities for philanthropic engagement. (Course Mission)*

*1 Chronicles 29:11: "Yours, O Lord, is the greatness and the power and the glory and the victory and the majesty, for all that is in the heavens and in the earth is yours. Yours is the kingdom, O Lord, and you are exalted as head above all."*

#### Professor's Contact Information

Professor: Jim Orr, J.D.  
Vice President for Advancement  
Phone: 325.674.2984  
Email: jim.orr@acu.edu  
Office: Hunter Welcome Center  
Office Hours: By appointment only

#### Course Description (from ACU Course Catalog)

In this course, students will explore God's design for the stewardship of resources, both time and money, and have meaningful opportunities to experience the impact of giving, both individually and collectively. Students will also work to develop a personal approach to philanthropy that is effective and consistent with their faith, passions, and future plans after ACU. The primary project will ask students to work as a foundation board and evaluate how to distribute \$50,000 to area non-profits. Throughout the course, the class will also engage with a variety of highly-qualified experts and guests – directors of foundations, experts on fundraising, biblical scholars, seasoned givers, and more.

## About the Course

This course presents a very unique educational opportunity – one which is found in only a handful of select universities. An anonymous donor has given you a generous gift – \$50,000, to give away. What a blessing and joy it will be for you and your classmates to impact the lives of others! Yet, it will also require much from you – such as an examination of your own giving philosophy and interests as well as the philosophy and interests of others. It will require an examination of the intended recipient(s) of charity and the proposed impact of the gift. First, we'll ask some foundational questions: What is philanthropy, and from whence did it come? Who is a philanthropist? Why do philanthropy and how is it done? We will also explore God's design for the stewardship of resources, both time and money, for Kingdom purposes.

We will also take a look at our own community. What are its needs and how are those needs being met? What are the needs not being met, and what might be done to fill these gaps? With the dollars the class has been given, how might we most strategically meet these needs?

Further, we must also ask a few questions of ourselves: What have I been given? How have I stewarded the resources that I have? What can I give? What are the values I most want to pass along? What impact does my faith have upon my personal philanthropic ethic?

This semester you will function in a few capacities, dancing back and forth between different roles. Collectively we'll operate as a *foundation board of directors*, deciding in our "Board Meetings" how and where to give our money. In your work with a smaller group of teammates, you'll function like a *foundation program officer*, cultivating relationships with nonprofits, assessing their needs and effectiveness, and perhaps advocating on their behalf to the larger board of directors. Near the end of the course you'll function like the *employee* of a nonprofit organization, writing grant evaluations to be considered by future classes. Finally, you will be functioning as an individual as you contemplate and make plans concerning the role philanthropy will play in your life.

In each of these roles you'll be developing experience that will serve you for a lifetime – as a professional, as a philanthropist, and as a citizen.

## Prerequisites

Students must have sophomore standing and have a GPA of 3.0 or higher, or obtain permission of the professor.

## Course Objectives

The primary learning objectives of this course are listed below along with the assignments used to assess your achievement of each objective.

Objective	Related Assignment(s)
To explore God's design for the stewardship of resources, both time and money, and understand the nature of philanthropy – its history, theories, ethics, practice and impact upon society.	Capstone Essay, Class Contribution
To research and understand public concerns in Abilene, specifically in these key areas: (a) health, wellness and basic human needs; (b) education, leadership and mentoring; (c) culture, arts and the environment; (d) human services and civil rights; and (e) community improvement and development.	Briefing Book and Presentation, Class Contribution
To understand and participate in the grant making process: establishing goals, performing due diligence, writing and vetting proposals, debating priorities, and reaching collective decisions.	Briefing Book and Presentation, Individual Proposal, Class Contribution
To understand the joy of giving and develop a personal philanthropic ethic that takes serious account of how one's time, talent, and treasure might benefit the public good.	Capstone Essay, Class Contribution

## Canvas

The learning management system for this course is Canvas. It is important that you are familiar with this system and how it operates. You will receive an email with a link that will allow you to access the course. You will be required to setup an account or use an existing one. You will need access to the Internet and a supported Web browser. If you need technical assistance at any time during the course or to report a problem with Canvas, please contact Team 55.

## Course Materials

Sievers, Bruce R. *Civil Society, Philanthropy, and the Fate of the Commons* (Medford, MA: Tufts University Press, 2010).

Frumkin, Peter. *Strategic Giving: The Art and Science of Philanthropy* (Chicago: University of Chicago Press, 2006).

Gunderman, Richard B. *We Make a Life by What We Give* (Bloomington, IN: Indiana University Press, 2008).

## Grades and Assignments

All grades will be given on a 100 point scale. Final grades will be determined as follows: A = 90 or higher; B = 80 – 89; C = 70 – 79; D = 60 – 69; F = below 60.

Class assignments and the percentage of the final grade represented by each assignment are listed below. Detailed descriptions of the assignments are included later in this syllabus.

Assignment	Individual / Group	Percentage of Final Grade
Briefing Book and Presentations	Individual / Group	30%
Class Contribution	Individual	25%
Reading Quizzes/Midterm Exam	Individual	20%
Capstone Essay/Giving Goal	Individual	25%

While I am happy to discuss any grade that you receive, please note that you must wait **48 hours** before talking with me about your grade on a particular assignment.

## Attendance Policy

Class attendance and participation are extremely important. You cannot participate if you are absent and therefore should plan on attending every class. Please notify me at least 24 hours in advance if you know that you will miss a class session.

If you reach **three (3)** unexcused absences, **you will be dropped from the course. This number will be reduced on a pro rata basis for university excused absences.** Please note that being late to class two (2) times will also be considered one (1) unexcused absence. While there is no “attendance grade,” please note that absences can have a significant impact on your class contribution grade. **Because this class meets only one time per week in a three-hour block, more than two (2) unexcused absences will reduce your letter grade.**

I recognize that some students may have to miss class due to university excused absences such as athletics or for personal or family emergencies. With respect to university excused absences, it is your responsibility to look through the course schedule and inform me **at least one week in advance** of any conflict you may have. It is very important that I’m made aware of your absence prior to class.

## Academic Accommodations

If you want to request academic accommodations, contact the ACU Student Disability Services Office (a part of Alpha Academic Services). To receive accommodations you must be registered with Disability Services and complete a specific request for individual classes. Call 325.674.2667 for an appointment with the Director of Disability Services.

## COBA Honor Code

### **Objective**

COBA faculty, staff and students will strive to proclaim in their lives competence, character and community. In joining COBA, students, faculty, and staff covenant to abide by the following ethical principles.

### **Competence**

To lead and serve well requires competence. And to become competent requires diligence and hard work. We owe it to all who have prepared the way and who will follow in our footsteps, to be good stewards of opportunities and resources. Thus, in all you do: set priorities, seek excellence and professionalism in your work, satisfy requirements, and take responsibility for your learning and performance. You cannot build competence if you lie, cheat, steal, or tolerate those who do.

### **Character**

A reputation of good character is built slowly through testing, yet can be destroyed in an instant by compromise or careless work, just as it can through injustice. Guard your character; it is worth more than a grade or promotion. "A good name is more desirable than great riches; to be esteemed is better than silver or gold" (Proverbs 22:1). You cannot build character if you lie, cheat, steal, or tolerate those who do.

### **Community**

A spirit of fellowship and mutual encouragement holds each community member accountable. Accountability leads to a healthy community through adequate preparations for the tasks at hand, respectful truthfulness in all situations, and adding value to the tasks at hand. As a community, we must hold each other accountable to the principles of competence, character, and community. You cannot build community if you lie, cheat, steal, or tolerate those who do.

## Academic Integrity Policy

We support ACU's Academic Integrity Policy located at:

<http://www.acu.edu/academics/provost/documents/academic-integrity-policy.pdf>

This important policy offers examples of academic infractions and a process for assigning consequences and voicing appeals. Ignorance of this policy is never an excuse. Individual instructors will define course specific definitions, however, in general you should avoid:

- **Plagiarism:** Copying or even paraphrasing words or ideas from another source (including current or past students) without giving adequate credit.
- **Lying:** Inventing data or sources or making false attributions about the origin of material or offering a deceptive reason for an absence or delay in the completion of academic work.

- **Cheating:** Facilitating or participating in any process that circumvents the intent of any exam, test, quiz, paper, or assignment.

Any dishonest act observed or reported will be investigated and, if proven, reported in administrative offices and records, and may be subject to any or all of the following outcomes:

- A zero for the assigned work
- A reduction of one letter grade for the course
- A failing grade for the course
- Dismissal from the university

### Late Work Policy

Deadlines are important. As a result, assignments should be submitted as instructed before the start of class and will not be accepted late. Please note that if an assignment is due at the beginning of class, it is considered late if it is submitted after the beginning of class. For example, if an assignment is due at the start of class (*e.g.*, 3:00) it would be considered late if a student arrived to class late (*e.g.*, 3:30) and submitted the assignment.

### Electronic Device Policy

Use of cell phones is not allowed during class. Everyone, including the professor, will turn their cell phone off and place it in a designated area until class is over. Use of other electronic devices, such as tablets and laptops, are appropriate in regular class sessions and at certain points during case discussions. However, no devices are allowed when we are hosting a foundation board. **Failure to comply with this policy may result in a reduction of your final grade.**

### Description of Assignments

The following are summaries of the graded assignment for the course.

#### **BRIEFING BOOK & PRESENTATIONS (30%):**

Your biggest assignment for the semester comes in the form of a briefing book, about 40-50 pages in length, which you and your team will complete in parts over the course of the semester. This briefing book is basically a summary of your work for the semester. In it you will describe the public concern(s) that your team has focused on, analyzing the dimensions and constituents of those concerns, as well as the process and rationales by which you made funding decisions to address those concerns. The book will include such things as: data about the concern(s) you're addressing; what's happening in Abilene programmatically to address those concerns; what innovations and best practices can be found elsewhere to address those concerns; what gaps in services exist in Abilene; your theories of change,

leverage and/or scale for addressing these concerns; information about the nonprofits you've assessed; evaluation metrics; your process for selecting finalists; funding letters; letters declining funding; grant applications; and a host of other items.

### **CLASS CONTRIBUTION (25%):**

Your informed participation is vital to the success of this class and, more importantly, to the success of this unique venture. For our purposes, class contribution includes attendance, meaningful participation in class discussions and group assignments, and contribution toward the end-of-semester giving ceremony. In addition, class contribution includes a more subjective assessment of the degree to which you are invested in this process. What we're doing is important work. For that reason, you must be engaged in all aspects of the course.

### **ASSIGNED READING QUIZZES/MID-TERM EXAM (20%):**

There will be assigned reading assignments throughout the semester. Quizzes may be given to the class in regard to the assigned reading. In addition, a mid-term exam will occur over reading assignments and class discussions.

### **CAPSTONE ESSAY/GIVING GOAL (25%):**

Your final assignment is a capstone essay exploring your own personal views on philanthropy and how do you intend to approach philanthropy going forward. You will also be asked to create your own giving goal. This essay will draw from your reading throughout the semester and our class discussions.

## **Course Schedule**

**This schedule is tentative and subject to change.** It is your responsibility to consult Canvas on a regular basis for updates regarding daily class preparation, cases, readings, and assignments.

### **August 27: Introduction**

- Watch (in class) Bill Gates's 2007 Harvard Commencement Address (available from: <http://www.youtube.com/watch?v=zPx5N6Lh3sw> or <http://news.harvard.edu/gazette/story/2007/06/remarks-of-bill-gates-harvard-commencement-2007/> )
- Biblical text: I Chronicles 29:1-20
- Initial giving assignment
- Pre-course survey

### **Sept. 3: What is a Civil Society? What are the Institutional Structures that impact society?**

- Sievers, *Civil Society, Philanthropy, & the Fate of the Commons*, pp. 1-30, 45-62
- Deuteronomy 15:7-11
- Report on initial giving assignment
- Study group assignments/briefing book
- Introduction of Philanthropy Lab: opportunities and initiatives

### **September 10: Imagining Philanthropy/Role of Faith in Giving**

- Gunderman, *We Make a Life by What We Give*, pp. 1-12
- Andrew Carnegie, "The Gospel of Wealth" (Canvas)
- Frumkin, *Strategic Giving*, pp. 1-11
- Matthew 6:19-21; and 25:31-46
- Community Foundation of Abilene: initial review of grant applications and distribution of applications among each study group

### **September 17: Frameworks for Philanthropy; Utilitarianism and other approaches to giving**

- Gunderman, *We Make a Life by What We Give*, pp. 19-29
- Listen to "I Was Just Trying to Help," *This American Life*, episode 503 (starting at 06:15 through 33:36 – part of Act One) (available from: <http://www.thisamericanlife.org/radio-archives/episode/503/i-was-just-trying-to-help>)
- Listen to 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](https://www.ted.com/talks/peter_singer_the_why_and_how_of_effective_altruism))
- Listen to Larry S. Temkin, "On Peter Singer, Effective Altruism and Our Obligations to the Needy" (available from: <http://blog.practicaethics.ox.ac.uk/2017/12/video-series-larry-s-temkin-on-peter-singer-effective-altruism-and-our-obligations-to-the-needy/>)
- Mark 10: 17-31

### **September 24: Creating Value and Achieving Intended Objectives – Theories of Change and Leverage**

- Frumkin, *Strategic Giving*, 174-203
- Luke 11:5-13
- Briefing book work
- Panel of experts: corporate philanthropy (public companies/faith communities)
- Set up site visits with grant applicants

### **October 1: Creating Value and Achieving Intended Objectives – Theories of Scale**

- Frumkin, *Strategic Giving*, pp. 203-216
- Matthew 14:13-21
- Development of metrics for evaluation of grant applications (by each small group), assessment of community needs
- Panel of experts: private and family foundations/philanthropists

### **October 8: Institutions and Vehicles for Philanthropy (Types of Foundations)**

- Frumkin, *Strategic Giving*, pp. 217-252
- Panel of Experts - various public/private foundations
- **Mid-Term: “open book” exam**
- **\*\*Briefing Book Draft #1 Due\*\***

### **October 15 and 22: Due Diligence/Site Visits**

\*\*Site visits will occur during these two weeks. To ensure there will be sufficient planned and shared time for each study group to visit the sites of the applicants for funding, there will be no official class meetings on October 15 and 22. Please take time to read:

- Orosz, *The Insider’s Guide to Grantmaking*, pp. 130-142

### **October 29: Giving Styles and Ethics/Report of Site Visits**

- Gunderman, *We Make a Life by What We Give*, pp. 19-29, 132-139
- Frumkin, *Strategic Giving*, pp. 253-266
- Panel of Experts – individual donors/family foundation
- Report of site visits (by study group)
- Luke 21:1-4

### **November 5: Board Meeting #1; Presentations**

- Presentation (by study group) recommending applicants for distribution of awards
- Board Meeting # 1 – review of presentations and evaluation of requests
- Abilene Communities Foundation participation
- Proverbs 3:27
- **\*\*\*Briefing Book Draft #2 Due/Presentations\*\*\***

## November 12: Board Meeting #2; Determining our Grant Recipients

- Board Meeting # 2 – final determination of grant recipients
- Panel of experts – evaluation of grants
- Participation in Griggs Center Entrepreneurship events
- Gunderman, *We Make a Life by What We Give*, pp. 99-107
- Luke 18:18-30

## November 19: Evaluation Metrics

- Development of metrics for evaluation of grants awarded (by study group)
- Gunderman, *We Make a Life by What We Give*, pp. 78-88
- Preparation of denial of grant letters/awarding of grant letters
- Mark 12:41-44

## November 26: The Joy of Giving and Personal Philanthropic Ethics

- Gunderman, *We Make a Life by What We Give*, pp. 191-197
- Macaskill, Morgensen, and Ord, "Giving Isn't Demanding", *The Ethics of Giving*, Woodruff (2018)
- Arthur Brooks, *Why Fund-Raising is Fun*  
[http://www.nytimes.com/2014/03/30/opinion/sunday/why-fund-raising-is-fun.html?\\_r=0](http://www.nytimes.com/2014/03/30/opinion/sunday/why-fund-raising-is-fun.html?_r=0)
- Henri Nouwen, *The Spirituality of Fundraising*, pp. 1-40
- Hebrews 12:1-2

## December 3:

- **\*\*\*Briefing Book Final Copy Due\*\*\***
- Post-course survey
- Preparation of Capstone Essay/Giving Goal

## December 10: Giving Ceremony/Final Exam

- **\*\*\*Capstone Essay Due\*\*\***
- Giving Ceremony with award recipients