

# VALUES-IN-ACTION: THE DUKE PHILANTHROPY LAB

*A First-Year Seminar and Experiential-Learning Workshop*

Jewish Studies / Religion / Ethics / Poli Sci 89S  
Public Policy 89S

Fall 2017

Modes of Inquiry: *CCI and EI*

Area of Knowledge: *CZ*

**\*\* Service Learning Course \*\***

Tuesdays 3:05-5:30pm  
319 Gray Building

## **Instructors:**

Laura S. Lieber, PhD  
Professor of Religious Studies  
Director, Duke Center for Jewish Studies

Christy Lohr-Sapp, PhD  
Associate Dean of Duke Chapel  
Faculty Affiliate, Jewish Studies

## **Office Hours:**

Tuesdays 10a-12p  
and by appointment  
[laura.lieber@duke.edu](mailto:laura.lieber@duke.edu)

Mondays 9-11am  
and by appointment  
[christy.lohr@duke.edu](mailto:christy.lohr@duke.edu)

## **Course Description:**

In this course, we will come to understand the nature of giving—the means and mechanisms, problems and solutions, successes and failures—even as we study the history, theory and structure of civil society. We will pay special attention to how specific religious traditions and communities have understood personal-societal obligations through time. In our exploration of this material, we will draw examples from the Jewish traditions (highlighting a premodern model of social organization and mutuality, and exemplifying minority-majority dynamics over time) and American traditions (with a focus on the present), in particular but not exclusively, to ground our analysis. A special feature of the course will be the opportunity for the class to apply theoretical knowledge to a real world decision-making process by determining how to real funds—to make **actual grants**—to nonprofit organizations, locally and (potentially) abroad.

This course will employ a team-based learning model. The class will periodically constitute itself as a pluralistic philanthropic board composed of “committees” of 4-5 students; your committee will meet as a working group for a substantial part of each meeting, as well as outside of class. Each committee will develop funding priorities and award grants to local organizations in specific fields of interest and urgency. In the process of choosing recipients, we will reflect on several key questions: What is the basis of private action for the public good? How do non-governmental organizations operate domestically and globally? How should charitable dollars be distributed and what role do nonprofit organizations and philanthropic dollars play in a modern democracy? What are the appropriate criteria to be used to select grant recipients and, as donors, reflect on our own actions and choices? And—distinctive to this class—how do our

cultural, ethnic, and religious traditions and those of others affect how we give and how we can act most effectively for good in the world?

This course will provide an in-depth understanding of philanthropy, tsedakah, zakat, benefaction: its historical development, normative and structural elements, and modern agency as a driver of social change. By the end of the course, students will have knowledge of the history and structure of civil society, the tradition of competing value commitments in civil society, the modern nonprofit sector and its relationship to government and for-profit arenas, and key challenges facing nonprofit organizations today nationally and globally. Ultimately, students will apply this knowledge to a practical exercise in philanthropic grant-making. Readings come from political philosophy, history of ideas, traditional/sacred scriptures, public policy, and mass media; we will, in particular, focus on a range of readings from the Jewish tradition—from the biblical period to today—in order to explore how these ideas change over time.

### Format and Grading:

Each meeting will be divided into at least two discrete components: one divided into committees and oriented towards applied philanthropic tasks; and one organized more as a conventional seminar, although still organized around committee/teams (hence, “Team Based Learning”). Every meeting will be framed by readings from a specific religious time/tradition, which over the course of the semester will begin to constitute a more complex vision of the topic. This format allows for maximum student interaction and probing of the ideas at the heart of our course, both in theory and practice. Students will also devote significant time outside of class to the applied philanthropic component of the course—e.g., visiting potential grant recipients on site, rehearsing and planning presentations, etc. Guest speakers will bring personal experience and expertise to bear on our enterprise.

### Course Requirements and Assignments:

- Participation: *Includes individual, committee, and class; attendance at **two** FIRG seminars* 40%  
FIRG schedule: <http://cspcs.sanford.duke.edu/events>
- Final committee presentation (Nov. 28 and Dec. 5) 20%
- White papers: Issue and Organization (Oct. 17) 10%
- Committee reports on finalists to seminar board as a whole: 10%
- Final reflection essay (due Dec. 11) 10%
- “Philanthropic Ethical Testimony”: 10%  
*How you see yourself “giving back”—time, talent, treasure—in 5, 10, 20 years*  
*The Philanthropy Lab’s “Giving Pledge” meets the tradition of the “Ethical Will”*

### A Note about Class and Committee (Team) Participation:

In exploring the concept of civil society and the role of philanthropy and nonprofits in contemporary life, the goal of the class is to facilitate your own explorations using the historical, theoretical, conceptual, and legal tools we shall discuss in class. Successful exploration on your own will require dialogue and discussion. In order to be prepared for discussion, it is essential that you come to each class session having read intelligently the materials assigned and having given some thought as to how the readings relate to the course in general.

You should come to each class meeting with considered views about (1) what the main claims offered in the texts or cases are; (2) the arguments offered in favor of these claims; (3) whether these are good or plausible arguments; (4) what alternatives to the claims and arguments exist; and (5) whether some alternative is superior to the claim under discussion. **We may not discuss all the readings, but the readings will**

*cumulatively significantly help you and your “committee” in the reflective and decision-making processes.*

\*\* NOTE: Electronic devices—phones, tablets, computers—are only to be opened or accessed when so instructed by the professors. At all other times, devices are to be put away and kept in silent mode. \*\*

Objections are important. But keep in mind that highlighting puzzles and problems (even interesting puzzles and problems!) is *easy*: we can be certain in advance that every idea is imperfect. But we are trying to decide what to think about important issues of significant consequence, not demonstrating debater’s skills. The hard part is to figure out what to think – what we should think -- once we understand the range of theoretical options and competing arguments.

## Course Schedule

**BEFORE THE FIRST CLASS:** All items shared in email and posted to course SAKAI site

- Complete online survey for The Philanthropy Lab
- Read and be ready to discuss these short readings:
  - Andrew Carnegie, “The Gospel of Wealth”:  
<https://www.swarthmore.edu/SocSci/rbannis1/AIH19th/Carnegie.html>
  - Darren Walker (Ford Foundation): “Toward a New Gospel of Wealth”  
<https://www.fordfoundation.org/ideas/equals-change-blog/posts/toward-a-new-gospel-of-wealth/>
  - The Book of Ruth from the Hebrew Bible

**Week 1 (8/29):**

**CONCEPTUAL FRAME: Hebrew Bible**

**READINGS: The Book of Ruth**

- Discuss survey, and the two “Gospels of Wealth,” and Ruth
- Division into teams
- Brainstorm Focus Areas for the Duke Philanthropy Lab Board:
  - What are the pressing problems philanthropy can, should, or must address?
  - Rank your top four and be able to explain your reasoning
- Potential “committee” foci/representative organizations include (and some may be combined):
  - Health (incl. public health)
  - Education & Early Childhood
  - Poverty (homelessness, hunger)
  - Prison Reform and Death Penalty
  - Refugees and Immigrant Rights
  - Human Trafficking
  - Environment
  - Arts and Culture
  - Gun Violence
- **For next week**, bring an initial list of SIX potential nonprofits you think should be in your committee’s initial pool and be able to discuss them in light of the follow:
  - What makes a gift “good”? What diminishes the “good” of a gift?
  - What can a person give aside from money?
- Go over **grant letter** from the Philanthropy Lab

**Week 2 (9/5):**

**CONCEPTUAL FRAME: New Testament**

**READINGS: Gospel of Mark and the Book of Acts; Shane Claiborne, “Mark 2” in *School(s) for Conversion***

**GUEST SPEAKER: Robin Barefoot, Triangle Community Foundation**

Part 1 – Seminar Discussion: Continuation of conversation from Week 1

- Discuss grant letter from the Philanthropy Lab
- Discuss biblical sources (Hebrew Bible, New Testament, idea of “Gospel” in Carnegie & Walker)

Part 2 – Team meetings: discuss focus, preliminary organizations and objectives; draft committee “charge”; begin to research issue—where is intervention urgently needed? What sources can you use to research? Make preliminary research plan as committee and assign tasks.

**Week 3 (9/12):**

**CONCEPTUAL FRAME: Hinduism**

**READINGS: Diana Eck, “The Religious Gift,” and Juergensmeyer, Mark, and Darin M.**

**McMahon. "Hindu Philanthropy and Civil Society" *Philanthropy in the World's Traditions***

**GUEST SPEAKER: Leela Prasad (Religious Studies)**

Part 1 – Committees: Present research on issue and begin to cluster big list of possible organizations

Part 2 – Seminar

- 9/13 FIRG: Richard Graber, Bradley Foundation

**Week 4 (9/19):**

**CONCEPTUAL FRAME: Buddhism**

**READINGS: Chapters from *Philanthropy in the World's Traditions***

**GUEST SPEAKER: Hwansoo Kim (Religious Studies)**

Part 1 – Committees: Continue to research the issue that engages your group; focus on the nature of the problem you are trying to address and how a philanthropic intervention can help or harm

Part 2 – Seminar

**Week 5 (9/26):**

**CONCEPTUAL FRAME: Islam**

**READING: Hasan, *Human Security and Philanthropy* (excerpt; on Sakai)**

**GUEST SPEAKER: Mohsen Kadivar (Religious Studies)**

Part 1 – Committees: Start drafting “issue” whitepapers (where do you intervene and why?)

Part 2 – Seminar

**Week 6 (10/3):**

**CONCEPTUAL FRAME: Medieval Christianity**

**READING: The Life of Francis**

**GUEST SPEAKER: Father Mike Martin (Duke Newman Center)**

Part 1 – Committees: Finish issue whitepapers and begin to integrate NPs

Part 2 – Seminar

**FALL BREAK: TRIP TO DC**  
**(Details to Come!)**

**Week 7 (10/17):**

**CONCEPTUAL FRAME: Classical Rabbinic Tradition**

**READINGS: Selections from Midrash / Talmud; and AJWS website <http://www.on1foot.org/>**

Part 1 – Committees: Write organizational whitepapers—two organizations per committee member

Part 2 – Seminar

**Week 8 (10/24):**

**CONCEPTUAL FRAME: Medieval Judaism**

**READINGS: Selections from Maimonides' *Mishneh Torah* and *Shulchan Aruch***

Part 1 – Committees: Review proposals and other materials from candidate organizations as presented by committee members; request further information from each other.

Part 2 – Seminar

**Week 9 (10/31):**

**CONCEPTUAL FRAME: Current “takes” on religion and philanthropy in US**

**READINGS: TED talks (specific episodes will be noted)**

**GUEST SPEAKER: Stephen Bayer (Duke Development)**

Part 1 – Committees: Individuals make cases to rest of committee; can select FOUR to present to class as “committee report”

Part 2 – Seminar

**Week 10 (11/7):**

**CONCEPTUAL FRAME: Humanism**

**READINGS: Excerpts from Greg Epstein, *Good without God* (SAKAI)**

**GUEST SPEAKER: Todd Stiefel (Secular Coalition for America)**

Part 1 – **Team Board Meeting!** Present your four finalists to the class as a whole; class Q&A on the finalists; committees begin process of narrowing down how to dispense their funds (no more than two organizations; can give varying amounts to organizations; can choose to set aside money to give to other students’ nominee groups).

Part 2 – Seminar

**Week 11 (11/14): NOTE LOCATION CHANGE – Meeting at Sanford School!**

**CLASS GUEST: Joel Fleishman (Sanford School of Public Policy)**

**READINGS: TBA (SAKAI)**

Part 1 – Committees: Prepare major class presentation

Part 2 – Seminar; also discuss “Ethical Will” assignment for Thanksgiving break (model Ethical Wills examined)

- 11/15 FIRG: Steve Denning, General Atlantic Partners

**Week 12 (11/21): No Class – Finalize Presentations for Final Sessions!**

*Presentations need to include:*

1. *Research on the issue overall (problems, various strategies to ameliorate, current research, gov't policy and effects, etc.)—long term, short term, limits of what money can do?*
2. *Explain major kinds of philanthropic (and other) responses; evaluate briefly*
3. *Background on chosen groups: what it does overall and what the gift will do; experiences with people at the NP*
4. *How allocations determined*
5. *Hopes for gift and its effects*

Over **Thanksgiving break**, you should talk with at least one family member or close friend (in person or via Skype, etc.) about “giving” and “doing good” in his or her experience as you begin to formulate your own statement of ethics and commitments (your “ethical will”/giving pledge).

**Week 13 (11/28):**

**SPECIAL MEETING: Visit to the Archives! “History of the Dukes” (Trudi Abel, archivist)**

**READING: Excerpts from Robert Durden, *The Dukes of Durham* (SAKAI)**

- Committees present their grantees and entire class discusses; no votes, but straw polls allowed
- Award BONUS funds collectively (both “real” and “pending”), either to already-awarded organizations or to runners-up if well-argued
- Ideas for extended reflection -- How do we know if we have, in fact, “done good”? What counts as success or “impact”? How do we assess our process? What do we want from this? How will we “track” this as we go? (Fall 2019 Reunion Dinner!) → Eval Leaders
- What are we, as donors, hoping for? What are the organizations hoping for? How would we want, honoring both sides, to revisit this gift next semester?

**Week 14 (12/5):**

**COMMITTEE PRESENTATIONS AND FINAL DECISIONS**

- Class critique of experience and discussion drawing upon class themes
- Select organization for the Ambassadors program (and two student reps)
- Walk through award ceremony and presentations
- Write and post personal giving philosophies (see: The Philanthropy Lab)
  - <https://www.thephilanthropylab.org/givinggoal.aspx>
- Concluding Thoughts

**FINAL FIRG: 12/6 - Harvey Fineberg, Moore Foundation**

## **PERSONAL REFLECTIONS (5 pages) – DUE DEC. 11**

In this brief, but formal and polished, essay, return to your initial reflection from the first class and reflect back on our readings, discussions, and our philanthropy project. What has changed? What are you sensitive to now? What problems still vex you? What issues now pull at you? How do you see yourself being or doing differently going forward? Single out concrete readings and tasks from throughout the semester.

## **GRANT AWARD PRESENTATIONS**

### **This Ceremony will be in Lieu of Final Exam**

Include PowerPoint of personal “giving goals”

Reception for students, organizations, and guests

*Location & Time TBA*

**Ambassadors’ Conference:** Dallas, June 22-24 (two students will be selected!)

*Announce date for reunion (Fall of 2019)*

## RESOURCES FOR STUDYING NONPROFITS

The following list is by no means exhaustive, but it will help you in your initial forays into research. We will set up a forum on the course website that will allow us all to share resources and information.

### General sites:

Guidestar provides basic data about nonprofits, including the legally required annual 990 forms filed by most charities: [www.guidestar.org](http://www.guidestar.org)

*Nonprofit and Voluntary Sector Quarterly* – an academic journal that publishes a lot of charitable giving and nonprofits. Also available through a college subscription.

Idealist.org: [www.idealist.org](http://www.idealist.org) (clearing house for nonprofit ideas and news)

NonprofitHub.com: [www.nonprofithub.com](http://www.nonprofithub.com) (very large list of links, broken down by category; some broken, some frivolous)

Urban Institute: [www.urban.org](http://www.urban.org) (general social and economic policy research institute, with section devoted to nonprofits and philanthropy)

Independent Sector: [www.independentsector.org](http://www.independentsector.org) (broad-based coalition dedicated to improving America's third sector)

Harvest Today: <http://www.harvesttoday.org> (nonprofit and philanthropy news and information service)

### On Philanthropy:

*The Chronicle of Philanthropy*: [www.philanthropy.com](http://www.philanthropy.com) (the national weekly devoted to philanthropy).

*The Philanthropy Journal Online*: <http://www.pj.com>.

*The Non-Profit Times*: [www.nptimes.com](http://www.nptimes.com) (monthly news magazine)

Center on Philanthropy at Indiana University: [www.philanthropy.iupui.edu](http://www.philanthropy.iupui.edu)

EPhilanthropyFoundation.org: [www.ephilanthropy.org](http://www.ephilanthropy.org) (organization dedicated to promoting online philanthropy; includes ezine)

Ashoka: [www.ashoka.org](http://www.ashoka.org) (organization supporting social entrepreneurship, with section dedicated to nonprofits and philanthropy)

*Philanthropy News Digest*: <http://fdncenter.org/pnd> (Foundation Center's online newspaper)

American Association of Fundraising Counsel: <http://www.aafc.org> (Organization dedicated to professionalizing and ensuring ethical behavior amongst philanthropies)

The Philanthropic Initiative: <http://www.tpi.org> (TPI offers strategic services to philanthropists)

American Institute of Philanthropy: <http://www.charitywatch.org> (general purpose philanthropy website, including ratings of organizations)

Nonprofit Management Education Center: <http://www.uwex.edu/li/learner/sites.htm> (large list of links to a variety of third sector related sites)

Center for Strategic Philanthropy & Civil Society: <http://cspcs.sanford.duke.edu/>

Non-Profit Quarterly: [www.nonprofitquarterly.org](http://www.nonprofitquarterly.org)

Wealth and Giving Forum, Boston College: [www.wealthandgiving.org/people\\_schervish.html](http://www.wealthandgiving.org/people_schervish.html)

The Center for the Study of Philanthropy at the City University of New York Graduate Center: [www.philanthropy.org](http://www.philanthropy.org)

Science of Generosity Initiative, University of Notre Dame: <http://generosityresearch.nd.edu/>

On foundations:

Foundation Center: [www.fdncenter.org](http://www.fdncenter.org) (database on foundations, for both students and practitioners of philanthropy)

Foundation Center's international philanthropy page:  
[http://fdncenter.org/research/npr\\_links/npr08\\_int.html](http://fdncenter.org/research/npr_links/npr08_int.html)

Council on Foundations: [www.cof.org](http://www.cof.org) (membership organization of foundations providing information, expertise and advice to foundations and general public)

Minnesota Council on Foundations: <http://www.mcf.org> (includes a variety of non-Minnesota links, especially under "Links of Interest")

On NGOs, US and international:

Center for Global Prosperity: [www.global-prosperity.org](http://www.global-prosperity.org) (new Hudson Institute/Brady Center site on global philanthropy and remittances)

Interaction: [www.interaction.org](http://www.interaction.org) (alliance of 160 of the largest U.S. based NGOs working on international relief and development)

Duke University Non-governmental Organizations Research Guide:  
<http://docs.lib.duke.edu/igo/guides/ngo> (includes very comprehensive list of NGOs, including international ones, with weblinks)

Boardsource: <http://www.boardsource.org> (dedicated to NGO development, especially of boards and their members)

Global Policy Forum: <http://www.globalpolicy.org/ngos/index.htm> (GPF monitors UN policy making; this page relates to the UN and NGOs)