Honors Colloquium:
Spring 2014

HCOL 40023:
On Human Nature — Giving & Philanthropy

Section 682
Scharbauer Hall 1011
Thursday 5:00–7:00 PM

Course Information

Dr. Ron Pitcock; J. Vaughn & Evelyne H. Wilson Honors Fellow
1016A Scharbauer Hall
257-7125 (Honors), 257-6252 (Direct)
Monday 10:00-11:00; Wednesday 10:00-11:00; Thursday 1-2
Email: r.pitcock@tcu.edu
Twitter: @ronaldlpitcock

The Philanthropy Lab
Web site: https://www.thephilanthropylab.org
Facebook: https://www.facebook.com/ThePhilanthropyLab
Twitter: https://twitter.com/ThePhilLab

Overview

"Nature of Giving," an upper-division Honors colloquium, will concentrate on two primary learning outcomes.

First, students will gain an understanding and appreciation for the meaning/importance of philanthropy. Students will examine the scope and diversity of the philanthropic sector through historical figures like Andrew Carnegie and John D. Rockefeller and current philanthropists Warren Buffett and Bill Gates, who co-founded The Giving Pledge—a challenge directed toward the wealthy to give away a majority of their wealth to charitable causes. This work will introduce students from a range of disciplines to the complex roles various foundations currently play in US society and culture, and encourage them to examine further the intersections of philanthropy with policy, the arts, business, law, and society.

Second, students will solve problems associated with philanthropy by participating in real philanthropic endeavors. Students will research various nonprofit organizations located in both Fort Worth and international locations, visit and conduct interviews, develop various memoranda/briefing
Course Objectives
- To understand strategic philanthropy: an alignment of who, what, when, where, why and how.
- To understand the history and current dimensions of the nonprofit sector and philanthropy
- To review the various contexts of philanthropic foundations and how they have evolved into the organizations they are today.
- To analyze and debate the roles and responsibilities of philanthropic foundations.
To participate in the philanthropic process: research organizations, perform due diligence, make proposals, persuade audiences to your cause, and debate merits, as well as to whom funds should be given.

To make and discuss moral judgments, to make micro-decisions while considering the macro-consequences.

To connect readings and discussions to real life through interactions with practitioners.

To formulate and support an individual opinion on the subject.

To develop critical analytical thinking and writing skills.

To speak/argue persuasively and publicly through debates and meetings.

To participate in a transformational course that reveals the responsibilities individuals must play to create a culture of giving.

To understand why people give and why some choose not to give even when they have the resources.

To question what would society look like if no one gave money to philanthropies.

To determine whether donors should identify where funds should be spent within an organization.

To determine what it means to “give away smartly.”

To understand why giving is actually difficult.

### Responsibilities of Colloquium Members

**Communicate effectively and clearly:** The colloquium requires students to write persuasively, speak effectively in public, debate ideas, listen carefully, conduct independent research and bring ideas from your own fields of specialization.

**Be professional, you are always representing TCU:** The written assignments have length limits because conciseness and professionalism are key. Be mindful of your status as representatives of TCU in all contacts with external organizations. You are not students in many of the situations this course will place you: you are professionals with $50,000 to give away responsibly.

**Be dependable and present:** Because class progress will often depend on your work, it is important to provide assignments on time by whatever means necessary. Even if you have to miss, the class needs your work product—notes, memorandums, and evaluations. Regular attendance is crucial to success in this course. Only official university-sanctioned absences are excused. Students missing class either to represent TCU in a university-mandated activity or attend conferences for professional development should provide official documentation of schedules and turn in work in advance. Two absences will warrant lowering your final grade by a letter grade; three absences will result in your failing the course.

**Be prepared:** I expect every course member to read all of the assigned texts in advance of class and prepare for discussion by taking notes. As you read, plan to make at least two contributions to the discussion. A planned contribution is mulled over in advance of class and can take the form of a question, illustration of a point in the reading, a disagreement, or a contrast with other readings.

**Respect your colleagues:** Once in class, be prepared to listen to and work with colleagues. At all times be prepared to comment on colleague’s statements or to summarize perspectives that have been presented. Always treat seriously any comment offered in earnest. If you disagree with a colleague, clarify your position using appropriate evidence or explanation.

**Seek help when needed:** Course members are welcome to secure additional help on papers at the William L. Adams Writing Center (ext. 7221). For writing-center information visit <http://www.wrt.tcu.edu/> online. Students who receive tutoring—formal or informal—from

---

*Liberality lies not in the multitude of the gifts but in the character of the giver.*

--Aristotle
individuals or programs other than the William L. Adams Writing Center are responsible for ensuring that the tutoring adheres to ethical standards consistent with those followed at the writing center (e.g., tutors do not write any portion of a student’s paper; tutors do not proofread; tutors do not assist students with take-home exams). Students whose tutoring does not meet such ethical standards violate the university’s code on academic misconduct and are subject to its penalties.

**E-college:** We will use the E-college learning platform extensively in this course. We will share all documents, have multiple threaded discussions, and track your grades on our class site.

**Philanthropy Fridays:** This speaker series will take place on 3-5 Fridays this semester. During these sessions, we will have a lunch and spend time with a speaker who will give a short presentation and answer questions regarding their work and thoughts on philanthropy, as well as your work in this class.

### Texts


Bezos, Mark. “A Life Lesson from a Volunteer Firefighter.” *TED Talk*. (online)

Blum, Debra. “Bigger Staff and Bolder Goals Turn Around a Quiet Hunger-Fighting Charity.” *The Chronicle of Philanthropy* 2 December 2012. (online)

———. “Go Big or Go Home: Tips from Share Our Strength.” *The Chronicle of Philanthropy* 2 December 2012. (online)


Brief History of Charitable Giving. [www.givingbetter.org](http://www.givingbetter.org) (online)

“Eli Broad.” *60 minutes*, 2011. (online)


Carnegie, Andrew. *The Gospel of Wealth* (online)

Carter, Majora. “3 Stories of Local Eco-entrepreneurship.” *TED Talk*. (online)

Conroy, Taylor. “How to Build a School in 3 Hours.” *TED Talk*. (online)


“Due Diligence Done Well: A Guide for Guidemakers.”


Fulton, Katherine. “You are the Future of Philanthropy.” *TED Talk*. (online)

Gates, Bill. *Harvard University Commencement Speech*, 2007. (online)

“The Giving Pledge.” [ABNews](http://www.abnews.com) (online)


Norton, Michael. “How to Buy Happiness.” *TED Talk* (online)


Reich, Rob. “A Failure of Philanthropy: American Charity Shortchanges the Poor, and Public Policy is Partly to Blame.”

Sherry, Christine. “Strategic Philanthropy for Beginners.” *Google Tech Talk*. (online)

Soros, George. “My Philanthropy.”


Stannard-Stockton, Sean. “Nonprofit Analysis: Beyond Metrics.” *Social Edge* 2012. (Online)

### Resources

**General Sites:**
- Idealist.org (clearinghouse for nonprofit ideas and news)
- Nonprofithub.com (large list of links organized by category)
- Urban Institute (general social and economic policy research institute, with section devoted to nonprofits and philanthropy)
- Guidestar (basic data covering nonprofits, including tax form 990 images; free but registration required)
- Harvest Today (nonprofit and philanthropy news service)
- Givelwell.org (Research on Charities)
- National Center for Charitable Statistics (http://nccsdataweb.urban.org/)

**On Philanthropy:**
- *The Chronicle of Philanthropy* (national weekly devoted to covering philanthropy)
- *The Non-Profit Times* (monthly news magazine)
- Center on Philanthropy at Indiana University (www.philanthropy.iupui.edu)
- EPhilanthropyFoundation.org
- Philanthropy News Digest (http://fdncenter.org/pnd)
- American Association of Fundraising Counsel (http://www.aafrc.org: Organization dedicated to ensuring ethical behavior amongst philanthropies)
- The Philanthropic Initiative (www.tpi.org: offers strategic services to philanthropists)
- American Institute of Philanthropy (www.charitywatch.org: general purpose philanthropy website, including ratings of organizations)
- Center for Strategic Philanthropy & Civil Service (http://cspcs.sanford.duke.edu)
- Non-Profit Quarterly (www.nonprofitquarterly.org)

### Past Gifts Made by Nature of Giving Alumni

#### 2013

- **Agua Para Todos** $6,200 Motorcycles for transportation of well Workers
- **Communities in Schools of Greater Tarrant County** $31,000 In-school tutoring and mentoring program for school in crisis
- **Feed By Grace** $18,294 Gardening Program and Shelter
- **Fortress Youth Development Center** $25,000 Transportation and setup for new building
- **Journey Learning Center** $10,000 Ipads and Learning devices for affordable autistic treatment program
- **SafeHaven of Tarrant County** $8,876 Mattresses & Washer/Dryer for shelter

#### 2012

- **Fort Worth Hope Center** $30,000 Full funding of dental clinic
- **Child Vision Center** $25,000 Majority funding of advanced eye

---

_Lao Tzu_

Kindness in words creates confidence. Kindness in thinking creates profoundness. Kindness in giving creates love.
Evaluation

In this class I will meet with you regularly to evaluate your progress. In order to receive a passing grade for this course, you must satisfactorily complete all major assignments on time with a cumulative passing average. Grades will be calculated using the following scale:

- 94-100 = A
- 90-93.999 = A-
- 87-89.999 = B+
- 83-86.999 = B
- 80-82.999 = B-
- 77-79.999 = C+
- 73-76.999 = C
- 70-72.999 = C-
- 67-69.999 = D+
- 63-66.999 = D
- 60-62.999 = D-
- Below 60 = F

Personal Statement on Philanthropic interests ............................................................. 5%
White Paper Evaluations of 5-6 Initial Charities .......................................................... 15%
Briefing documents: Top 50 Charities .............................................................. 10%
Group Briefings and Presentations: Top 15 Charities .................................................. 20%
  10% for the group as a whole and 10% your own component of the group work)
Online Response Work......................................................................................... 20%
One-page reflections and responses on process and learning.................................. 20%
Final Personal Reflection and Letter to Donor ....................................................... 10%

Assignments

Personal Statement on Philanthropic Interests:

A two-three page statement explaining what nonprofits appeal to you most and why. Please write this after taking your values test and Strengthquests test. (Individual)

Initial White Papers:

One-page studies of your initial nonprofit entries. (Individual)

Top 50 Briefing Documents:

Three-page studies of each organization. (Small Group/Individual).

Group Briefings and Presentations:

Ten to fifteen page documents analyzing finalist organizations. These documents should reflect complete due diligence. The presentation is a 15 minute presentation using multimedia. (Large Group).

Online Response Work

Weekly reactions to posts and reflections through the ecollege system. (Individual)
One-page reflections and responses

Periodic reflections on the process and articles. (Individual)

Final Personal Reflection & Letter to Donor (Individual)

<table>
<thead>
<tr>
<th>Tentative Schedule: 17 Weeks, 16 Meetings (N.B.: I reserve the right to make changes)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Week</strong></td>
</tr>
<tr>
<td><strong>Week 1</strong></td>
</tr>
<tr>
<td><strong>Introduction &amp; Building an SROI</strong></td>
</tr>
<tr>
<td><strong>Week 3</strong></td>
</tr>
</tbody>
</table>
| Week 4 | Tuesday, 4 Feb. | Debate and Narrow from 100 to 50 best charities that meet our SROI. Assign charities for Top 50 Briefing Documents | Comment on White papers through online threaded discussion | Readings:  
1. Read “Five Myths about Charitable Giving” – The Washington Post  
2. White Papers |
|--------|----------------|----------------------------------------------------------------|---------------------------------------------------|------------------------------------------------|
| Week 5 | Tuesday, 11 Feb. | What does due diligence mean and look like? What goes into your briefing document? | Come to class with a detailed list of charities you want to support and charities you feel should be cut | Readings:  
1. Brest & Harvey, chapter 5 in Money Well Spent  
2. Wallace, “Effort Aims to Steer Gifts to Nonprofits That Get Results”  
3. Salmon, “Donors Aren’t Always Right. Here’s How to Sidestep Their Misguided Ideas”  
5. “Why Can’t We Sell Charity Like We Sell Perfume?”  
6. Taylor Conroy: “How to Build a School in 3 Hours” (Video)  
| Week 6 | Tuesday, 18 Feb. | Work in pairs to visit nonprofits and produce briefing documents | Upload to E-College your briefing documents on the top 50 finalists (due Friday, 21 Feb. at noon) | Researching the Top 50  
Meet individually with RP on W-R-F |
| Week 7 | Tuesday, 25 Feb. | Debate and Narrow from 50 to 12 finalists | Online evaluation of nonprofits (threaded discussion) | Readings:  
1. Brest & Harvey, chapter 5 in Money Well Spent  
2. Wallace, “Effort Aims to Steer Gifts to Nonprofits That Get Results”  
3. Salmon, “Donors Aren’t Always Right. Here’s How to Sidestep Their Misguided Ideas”  
5. “Why Can’t We Sell Charity Like We Sell Perfume?”  
6. Taylor Conroy: “How to Build a School in 3 Hours” (Video)  
<table>
<thead>
<tr>
<th>Week 8</th>
<th>Tuesday, 4 March</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Debate and Narrow from 50 to 12 finalist charities</td>
</tr>
<tr>
<td></td>
<td>Assign charities for finalist groups</td>
</tr>
<tr>
<td></td>
<td>Online evaluation of nonprofits (threaded discussion)</td>
</tr>
<tr>
<td></td>
<td>One-page reflection</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Week 9</th>
<th>Tuesday, 11 March</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>SPRING BREAK</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Week 10</th>
<th>Tuesday, 18 March</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Due Diligence &amp; Intensity</strong></td>
</tr>
<tr>
<td></td>
<td>Discuss Due Diligence tailored to class needs</td>
</tr>
<tr>
<td></td>
<td>Class expectations for reports &amp; presentations: What information do you want?</td>
</tr>
<tr>
<td></td>
<td><strong>Readings:</strong></td>
</tr>
<tr>
<td></td>
<td>1. Stannard-Stockton “Nonprofit Analysis: Beyond Metrics”</td>
</tr>
<tr>
<td></td>
<td>2. Blum, “Bigger Staff and Bolder Goals Turn Around a Quiet Hunger-Fighting Charity”</td>
</tr>
<tr>
<td></td>
<td>3. Blum, “Go Big or Go Home: Tips from Share Our Strength”</td>
</tr>
<tr>
<td></td>
<td>Work in Groups to Perform Site Visits and Produce Reports</td>
</tr>
<tr>
<td></td>
<td>One-page reflection</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Week 11</th>
<th>Tuesday, 25 March</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Group Consultations with RP</strong></td>
</tr>
<tr>
<td></td>
<td>Work in Groups to Perform Site Visits, interview CEOs, and Produce Reports</td>
</tr>
<tr>
<td></td>
<td>Each Group is responsible for providing a formal report to professor about week’s Activities</td>
</tr>
<tr>
<td></td>
<td>One-page reflection</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Week 12</th>
<th>Tuesday, 1 April</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Group Consultations with RP</strong></td>
</tr>
<tr>
<td></td>
<td>Work in Groups to Perform Site Visits, interview CEOs, and Produce Reports</td>
</tr>
<tr>
<td></td>
<td>Each Group is responsible for providing a formal report to professor about week’s Activities</td>
</tr>
<tr>
<td></td>
<td>Briefing Document due online: Friday, 4 April @ 5 PM</td>
</tr>
<tr>
<td></td>
<td>One-page reflection</td>
</tr>
<tr>
<td>Week 13</td>
<td>Tuesday, 8 April</td>
</tr>
<tr>
<td>---------</td>
<td>-----------------</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Week 14</td>
<td>Tuesday, 15 April</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Week 15</td>
<td>Tuesday, 22 April</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Week 16</td>
<td>Tuesday, 29 April</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Week 17</td>
<td>Tuesday, 6 May</td>
</tr>
</tbody>
</table>
Basic Primer: Nonprofit Organizations in US

US Nonprofit Organizations 2008

501(c)(3) Organizations

501(c)(3) Public Charities
998,758 organizations

- Large orgs (Form 990 filers)
  - Hospitals
  - Colleges
  - Human services
  - Museums
  - Community foundations
  - Many others

- Small orgs (Below revenue/asset threshold to file 990)
  - Community theaters
  - Neighborhood orgs
  - New organizations
  - Many others

- Congregations (Registration optional)

501(c)(4) Social Welfare Orgs
111,561 organizations

- Civic associations
- Service clubs
- Advocacy orgs
- HMOs & managed care plans
- Many others

501(c)(6) Business Leagues
72,582 organizations

- Chambers of commerce
- Business associations
- Boards of trade
- Professional sports leagues

501(c)(7) Social & Recreation Clubs
57,030 organizations

- Country & golf clubs
- Fraternal & sororities
- Athletic clubs
- Alumni clubs
- Many others

501(c)(8) Fraternal Beneficiary Societies & Associations
58,166 organizations

- Fraternal organizations
- Lodges
- Benefit providers
- Insurers
- Many others

501(c)(10) Domestic Fraternal Societies & Associations
20,301 organizations

501(c)(13) Cemetery Companies
10,121 organizations

501(c)(19) Post or Organization of War Veterans
34,155 organizations

Other Exempt Organizations
32,251 organizations

Unregistered Organizations
Total Unknown