Philanthropy and Civic Engagement
CSCS 501
Philanthropy Lab
3 Credits

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crjasper@wisc.edu

Teaching Team
Cynthia Jasper, Professor and Lead Instructor
Morgan Smallwood, Teaching Assistant
Ye Tao, Visiting Scholar

Acknowledgement
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Course Description and Overview
This course explores philanthropy and civic engagement through giving time, money and effort to a public purpose. It includes the theory and structure of civil society, with special attention to the nonprofit sector. In addition to classroom learning, this course includes an exciting and unique experiential component. Over the course of a semester, students will decide on the distribution of real funds to support philanthropic goals through a philanthropy project. Students will learn the philanthropic process including creating a giving plan, as well as exploring strategic and creative ways to give that promote civil
Philanthropy has a long history of making a difference within our communities by taking private resources and developing them with a public purpose. More recently, philanthropic giving has become one of the largest trends in our society with Giving USA reporting in 2015, Americans gave over $373.25 billion to the philanthropic sector. Although philanthropic endeavors tend to be defined through gifts of money and time, the sector extends far beyond in more creative ways including social entrepreneurship to achieve the goal of making the world a better place. With approximately 1.4 million charitable and religious organizations that aid in advocacy, human and social services, research, education, as well as many others, our communities are stronger due to the support of these philanthropic works (Giving USA Foundation, 2016).

This course will provide an in-depth understanding of philanthropy, including its historical development, as well as normative and structural elements as a driver of social change. Contemporary topics will include: ethics, future trends, women, diverse populations, and youth philanthropy, as well as corporate, international, and disaster relief philanthropy. 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 related to philanthropic giving today nationally and globally. Ultimately, students will apply this knowledge to a practical exercise in philanthropic grant writing.

**Philanthropy Project**
The unique aspect of this course is a lab on philanthropy with a focus on grant development and donating in an effective manner. A special feature of this course will be an opportunity for students to apply theoretical knowledge to a real world decision-making process by determining how to allocate $50,000 in actual grant funds to nonprofit organizations. Students will learn how to formulate goals to give effectively and learn to assess whether the goals have been achieved.

Students will develop funding priorities and award grants in the field of Human Ecology: recognizing our values of personal and family well being specifically as it relates to children, families, consumers and communities. In the process of choosing recipients, students will address several key questions:

- How should funds be distributed in a way that optimizes the benefits, meets goals and objectives, and are consistent with one’s values?
- What is the basis of private philanthropic giving for the public good?
- To what extent do non-governmental organizations depend on philanthropic giving to operate and achieve goals 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?
• How will you generate future funds to support this course in the future? What is the process of raising funds for future students?
• How do you assess how successful your giving has been in accomplishing objectives and goals?
• How do personal values and goals influence decisions regarding formulating plans and developing personal philanthropic goals for the future.

Learning objectives
By the end of the course, students should be able to:
1. Critically analyze philanthropy issues from an ecological perspective.
2. Recognize the social responsibility of individuals within a larger community and reflect on the role of giving within civil society including corporate, international, and disaster relief philanthropy.
3. Identify multiple stakeholders and describe the possibilities, values, and limitations of philanthropic decisions.
5. Implement a fundraising plan to sustain this course for future students.
6. Share fund allocation decisions using written, oral, and visual communication.
7. Formulate personal philanthropic goals for the future

Course materials
All readings will be made available in electronic form via Canvas, with the exception of the required books:

George Bernard Shaw, Major Barbara (Penguin Classics, 2000).


Recommended Readings:

Communication and Technology Policies
Communication: Please check our Canvas site throughout the semester, reviewing the “Home” section, and other pertinent sections (e.g., “Assignments”, “Discussion”, etc”).
Course Design

The course will include readings and writing assignments, as well as discussions, guest speakers, and other class activities. Students are required to do all assigned readings and assignments before class in preparation for class discussion and participation.

Assignments and grade calculation

Timely completion of assignments is an important part of professionalism. Points will be deducted for each day that an assignment is late, unless you have obtained prior approval from the instructor or in the case of an unforeseen emergency.

All assignments and course requirements will be evaluated using UW-Madison’s grading scale (below).

<table>
<thead>
<tr>
<th>Letter Grade</th>
<th>GPA Value</th>
<th>Final Percentage Grade</th>
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</thead>
<tbody>
<tr>
<td>A (Excellent)</td>
<td>4.0</td>
<td>93-100%</td>
</tr>
<tr>
<td>AB (Intermediate Grade)</td>
<td>3.5</td>
<td>88-92.5%</td>
</tr>
<tr>
<td>B (Good)</td>
<td>3.0</td>
<td>83-87.5%</td>
</tr>
<tr>
<td>BC (Intermediate Grade)</td>
<td>2.5</td>
<td>78-82.5%</td>
</tr>
<tr>
<td>C (Fair)</td>
<td>2.0</td>
<td>70-77.5%</td>
</tr>
<tr>
<td>D (Poor)</td>
<td>1.0</td>
<td>60-69.5%</td>
</tr>
<tr>
<td>F (Failure)</td>
<td>0.0</td>
<td>&lt; 59.5%</td>
</tr>
</tbody>
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Your final semester grade will be determined with the course requirements listed below.

Class participation and attendance: 20%
Weekly reading assignments – preparation of questions based on the readings: 20%
Personal Philanthropic Goals 5%
Evaluation Plan for philanthropic project 5%
Preliminary philanthropy decision paper: 10%
Presentation of philanthropic project: 20%
Final project: 20%

Class participation

Attendance is mandatory and all absences will be accounted for in your final participation grade. In determining your grade, I will factor in both the frequency and the quality of your participation.

Each student is allowed one unexcused absence. For any additional absences, your attendance grade will be lowered unless you provide written documentation of an acceptable reason such as:

- Religious observations
- University sponsored requirements (with appropriate documentation)
- A doctor’s note verifying that you are unable or advised not to attend class
- Family death or other emergency

**Academic Integrity**
You are required to abide by the University of Wisconsin-Madison’s code of academic integrity. While you are encouraged to collaborate with your peers and to draw upon relevant literature, any work you submit for academic credit must be your own, written entirely in your own words unless clearly marked as quotations and properly attributed. If you have questions about the proper attribution of source material, please visit the Writing Center, 6171 Helen C. White Hall, or visit the center’s website to access student support resources.

**Special Accommodations**
I wish to fully include everyone in this course. Please alert me if you need any accommodations to the curriculum, instruction, or assessments of this course to enable you to fully participate. I will keep this information confidential. Additional information regarding accommodations can be obtained at the McBurney Disability Resource Center.

**Statement on Accommodation for Students’ Religious Observances**
According to campus-wide policy on religious observance, I invite you to notify me within the first three weeks of class of the specific dates for which you request relief for religious observance, since these may affect your ability to meet course deadlines.

**Classroom Climate and Incidents of Hate/Bias:**
My intention is to be inclusive and welcoming so that all students feel comfortable in the classroom while also being challenged to learn and grow. If a class topic or discussion makes you feel unwelcome or unsafe please talk to me about your concerns. If you are not comfortable speaking directly to me, you can contact SoHE’s Senior Assistant Dean, Annette McDaniel, amcdaniel@wisc.edu.

Please intervene in incidents of hate and bias when you can, and report incidents to me—if you feel comfortable—and/or to the UW-Madison hate and bias reporting system: students.wisc.edu/reporthate. The University and I are dedicated to addressing reports of hate and/or bias seriously, promptly, confidentially, and sensitively. Reports can include, but are not limited to, crimes such as vandalism or physical assault; non-academic misconduct such as online or verbal harassment or disruptive behavior; and/or microaggressions such as derogatory or demeaning speech from another student, TA, or faculty/staff member. A Hate and Bias Incident Team member will respond to your report and provide you with options to meet your needs. You can also report anonymously.

For more information, support, and resources regarding addressing hate and bias on campus, please visit www.students.wisc.edu/reporthate.
Learning Activities

Additional learning activities will take place both within and outside of the classroom to provide students with an opportunity to apply their understandings to a variety of historic and contemporary philanthropic issues.

Stitching History from the Holocaust—A True Story of Talent Lost: Students visit a gallery which is made possible by a family philanthropic foundation and hear from a guest speaker.

“Stitching History from the Holocaust explores the life and work of Hedy Strnad before her murder. The main feature of this exhibit is the recreation of Hedy’s dresses from her sketches. It serves as an example of what happens when human suffering is ignored and is a testament to the incalculable loss of the Holocaust.” – stitchinghistory.org

**DVDs:** Several DVDs will be shown throughout the course to emphasize course topics and provide examples of successful philanthropic endeavors.

- **The Polio Crusade:** “The story of the polio crusade pays tribute to a time when Americans banded together to conquer a terrible disease. The medical breakthrough saved countless lives and had a pervasive impact on American philanthropy that continues to be felt today.” – PBS American Experience
- **Andrew Carnegie:** “Andrew Carnegie’s life embodied the American dream: the immigrant who went from rags to riches, the self-made man who became a captain of industry, the king of steel. He preached the obligation of the wealthy to return their money to the societies where they made it.” – PBS American Experience
- **Henry Ford:** “An absorbing life story of a farm boy who rose from obscurity to become the most influential American innovator of the 20th century, Henry Ford offers an incisive look at the birth of the American auto industry and its impact on American culture. It also provides insights into Ford’s philanthropic pursuits” – PBS American Experience
- **Social Entrepreneurship:** Films highlighting the potential of social entrepreneurship as a means for bettering communities in many settings.

**Guest Speakers:** Students will be encouraged to attend guest lectures at the university which pertain to the topic of the course.

- **Jeff Snell,** CEO International Folk Art Alliance: “Social Innovation and Cross Sector Solutions: The Rise of Social Entrepreneurs in Wisconsin”, October 26 4:30-6:00pm
- **Dean Soyeon Shim,** School of Human Ecology: “Philanthropy, Fundraising and Strategic Planning”
- **Martha Taylor,** University of Wisconsin – Madison Foundation: “Philanthropists and Meaningful Giving”.

  - The University of Wisconsin Foundation is the official fundraising and gift-receiving organization for the University of Wisconsin–Madison.

**Site Visits:** Students will conduct in-depth evaluations of applications through site visits.

**Awards Ceremony:** On December 12, 2016 at 3pm, students will host a formal awards ceremony for grant awardees at the university. The ceremony will be attended by school administrators at SOHE as well as key leadership at UW Madison.
# Course Schedule and Readings

## WEEK 1

### 9/7 Lecture: Introduction to Philanthropy and Altruism

**Topics:**
- Course Overview and Introduction
- Define and Discuss Values and Alignment with Giving Plans
- Giving as Part of Personal Financial Planning

**Readings:**
- George Bernard Shaw, *Major Barbara*, Preface

## WEEK 2

### 9/12 Lecture: Looking at Philanthropic Leaders both Past and Present

**Topics:**
- Investigate Ways of Giving
- Development of Sustainable Support for Future Courses

**Readings:**
- Bruce R. Sievers, *Civil Society, Philanthropy and the Fate of the Commons*, Chapter 1
- George Bernard Shaw, *Major Barbara*, Act 1

### 9/14 Philanthropy Lab: Critical Philanthropy

**Goals:**
- Explore topic and issue areas of focus
- Conduct research on issues and prepare a report to the Board

**Prep Work:**
- Read Education Week: A Lesson on Philanthropy & Economic Inequality

## WEEK 3

### 9/19 Lecture: Philosophy of Philanthropy

**Topics:**
- Begin to Formulate Giving Plan

**Readings:**
- Bruce R. Sievers, *Civil Society, Philanthropy and the Fate of the Commons*, Chapter 2
- George Bernard Shaw, *Major Barbara*, Act 2

### 9/21 Philanthropy Lab: Defining the Purpose

**Goals:**
- Explore topic and issue areas of focus, Conduct research on issues and prepare a report to the Board

**Prep Work:**
- Chapter 2 of *Inspired Philanthropy*, Complete Exercise 2.3 “Vision and Values”, Exercise 2.4 “Indicators of your Values”
- Chapter 3 of *Inspired Philanthropy*, Complete Exercises 3.4 “Thinking About Change”, Exercise 3.5 “Imagining a Better World”.
- Post Responses for Exercise 3.5 on Canvas by 9/19 before class
### WEEK 4

**9/26 Lecture:** Women and Diversity in Philanthropy

**Topics:**
- Continue Working on Giving Plan

**Readings:**
- Tracy Gary, *Inspired Philanthropy*, Chapter 4: Creating a Mission Statement
- Bruce R. Sievers, *Civil Society, Philanthropy and the Fate of the Commons*, Chapter 3
- George Bernard Shaw, *Major Barbara*, Act 3

**9/28 Philanthropy Lab:** Creating a Mission Statement

**Goals:**
- Finalize decision on issue area
- Create Board Mission Statement

**Prep Work:**
- Post research memos to Canvas and review memos from other groups
- Read “A Step by Step Exercise for Creating a Mission Statement”
- Review Chapter 4 of *Inspired Philanthropy*

### WEEK 5

**10/3 Lecture** The Nonprofit and Voluntary Sector

**Topics:**
- Continue Working on Giving Plan
- Philanthropy and the Law – Guest Speaker from the UW Law School
- Frauds and Scams Associated with Philanthropic Giving

**Readings:**
- Bruce R. Sievers, *Civil Society, Philanthropy and the Fate of the Commons*, Chapter 4

**10/5 Philanthropy Lab:** Developing a RFP and Connecting with NGOs

**Goals:**
- Finalize Mission Statement if needed
- Begin developing the Request for Proposals and plan for contacting NGOs

**Prep Work:**
- Review Chapter 6 in *Inspired Philanthropy*, “Where to Give”
- Research RFPs from other foundations in the topic area and bring 2-3 in to share.

### WEEK 6

**10/10 Philanthropy Lab:** Finalizing the RFP and Communicating with NGOs

**Goals:**
- RFP Committee and Advertising Committee present plans
- Board reviews and finalizes plans
- **Release RFP by 10/12**
- Film on Social Entrepreneurship

**Prep Work:**
- RFP Committee and Advertising Committee prepare plan/documents to present
- Read: Evaluating Other’s Work

**10/12 Lecture:** Being Ethical in Philanthropy

**Topic:**
- Continue Working on Giving Plan

**Readings:**
- Bruce R. Sievers, *Civil Society, Philanthropy and the Fate of the Commons*, Chapter 5
**WEEK 7**

**10/17 Lecture:** Foundations  
**Topic:**
- Continue Working on Giving Plan  
- Film on Foundation/Philanthropy  
**Readings:**
- Bruce R. Sievers, *Civil Society, Philanthropy and the Fate of the Commons*, Chapter 6  
- Powell & Steinberg: Chapter 15: Foundations

**10/19 Philanthropy Lab:** Evaluating Proposals  
**Goals:**
- Determine evaluation plan for proposals  
- Create rubric and plan for group evaluations  
**Prep Work:**
- Read LCC Toolkit “Evaluating Grants”  
- Read Grant Evaluation Checklist  
- Review pages 94-95 of Inspired Philanthropy

**WEEK 8**

**10/24 Lecture:** The Grant Process  
**Topic:**  
**Readings:**
- Bruce R. Sievers, *Civil Society, Philanthropy and the Fate of the Commons*, Chapter 7

**10/26 Philanthropy Lab:** Exploring Philanthropies  
- Field trip to Stitching the Holocaust (date TBD)

**WEEK 9**

**10/31 Lecture:** Philanthropy When Needed Most (Disaster Relief Philanthropy)  
**Topics:**  
**Readings:**
- Bruce R. Sievers, *Civil Society, Philanthropy and the Fate of the Commons*, Chapter 8

**11/2 Philanthropy Lab:** Preparing for Site Visits  
**Goals:**
- Create plan for conducting site visits  
**Prep Work:**
- Review Chapter 10 of Inspired Philanthropy  
- Read “Conducting Site Visits”  
- Read “Smarter Site Visits”

**WEEK 10**

**11/7 Lecture:** Taking Philanthropy Abroad (International Philanthropy)  
**Topics:**  
**Readings:**
- Powell & Steinberg: Chapter 14: International Nongovernmental Organizations
### 11/9 Philanthropy Lab: Reviewing Proposals

**Goals:**
- Proposals due from NGOs
- Site Visit Committee and Evaluation Committee present updates to Board
- Film on Social Entrepreneurship/Family Foundations

**Prep Work:**
- Site Visit and Evaluation Committees consolidate notes and information from previous Board discussion. Prepare plans based on discussion and present to the Board.

### WEEK 11

#### 11/14 Lecture: Where Philanthropy is Going - Current and Future Trends

**Topics:**

#### 11/16 Philanthropy Lab: Conducting Site Visits

**Goals:**
- Conduct site visits

### WEEK 12

#### 11/21 Lecture: Corporate Philanthropy

**Topics:**
- Complete Giving Plans
- Assessment and Evaluation of Giving Plans for Measurement of Success: Indicators of Impact

**Readings:**
- Powell & Steinberg: Chapter 8: Collaboration between Corporations and Nonprofit Organizations

#### 11/23 Philanthropy Lab: Funding Decisions

**Goals:**
- Conduct remaining site visits
- Hold Decision Board Meeting to review proposals and make final evaluations
- Notify NGOs by 11/30

**Prep Work:**
- Site visit groups prepare presentations of proposal to share with the class

### WEEK 13

#### 11/28 Lecture: Present Giving Plan

**Topics:**
- Presentations of Giving Plans

**Readings:**
- Explore the following website: http://www.yli.org/philanthropy/resources.php

#### 11/30 Philanthropy Lab: Long Term Grant Evaluation Plan

**Goals:**
- Prepare for awards ceremony
- Continue communicating with Grantees
- Notify NGOs by 11/30
- Prepare plan for ongoing funding evaluations
WEEK 14

12/5 Lecture: Conclusion and Wrap-Up

Topics:
- Written plan for ongoing stewardship and Philanthropic Commitments

Readings:

12/7 Philanthropy: Preparing for Awards Ceremony

Goals:
- Conduct run through for Awards Ceremony
- Confirm attendance from NGOs and make final arrangements

WEEK 15

12/12 Awards Ceremony
- Formal Presentation of Gifts to the Recipients

12/14 Final Class
- Complete Post-Test
- Review and evaluation group process

Final Exam: 12/23 10:05am-12:05pm

Other Helpful Resources for Students

Local Websites:

- United Way of Dane County – Listing of Local Agencies [https://www.unitedwaydanecounty.org/volunteer-center/](https://www.unitedwaydanecounty.org/volunteer-center/)
- University of Wisconsin’s Morgridge Center for Public Service [http://www.morgridge.wisc.edu/](http://www.morgridge.wisc.edu/)
- UW’s Grant Information Collection [http://grants.library.wisc.edu/organizations/nonprofits.html](http://grants.library.wisc.edu/organizations/nonprofits.html)
- Community Shares of Wisconsin [www.communityshares.com](http://www.communityshares.com)
- Madison Community Foundation [www.madisoncommunityfoundation.org](http://www.madisoncommunityfoundation.org)

National:

- American Humanics [http://www.humanics.org/site/comL2KiN4LvH/b.1098773/k.BE7C/Home.htm](http://www.humanics.org/site/comL2KiN4LvH/b.1098773/k.BE7C/Home.htm)
- Association for Research on Nonprofit Orgs and Voluntary Action [http://www.arnova.org](http://www.arnova.org)
Foundation Center http://foundationcenter.org/
Guidestar www.guidestar.org
Independent Sector http://www.independentsector.org/
Nonprofit Academic Centers Council http://www.nonprofit-academic-centers-council.org
United Way of America http://national.unitedway.org/

**Philanthropy Links**

American Studies Association http://www.theasa.net
Association for Public Policy Analysis and Management http://www.appam.org/
The Center for Effective Philanthropy http://www.effectivephilanthropy.org/
Center for Lobbying in the Public Interest http://www.clpi.org/
Giving USA Foundation http://www.givingusa.org/index.htm
GrantsCentral http://www.grantscentral.org/
Joseph and Matthew Payton Philanthropic Studies Library (IUPUI) http://www.ulib.iupui.edu/special/psl/
National Committee for Responsive Philanthropy http://www.ncrp.org/
Points of Light Foundation http://www.pointsoflight.org/
Philanthropic Studies Index (IUPUI) http://cheever.ulib.iupui.edu/psipublicsearch/
The Philanthropy Roundtable http://www.philanthropyroundtable.org/

**Resources for Nonprofit Organizations**

Academy of Management http://www.aomonline.org/
Ask NCVO http://www.ncvo-vol.org.uk/askncvo/
BoardSource (formerly National Center for Nonprofit Boards) http://www.Boardsource.org/
Centerpoint for Leaders™ http://centerpointforleaders.org/
CharityChannel http://www.charitychannel.com/
Developing Human Resources in the Voluntary Sector http://www.hrvs-rhsbc.ca/
National Center on Nonprofit Enterprise http://www.nationalcne.org/
National Council of Nonprofit Associations http://www.ncna.org/
Nonprofit FAQ, Compiled by Putnam Barber  

Nonprofit Information, Compiled by ARNOVA http://www.arnova.org/nonprofitinformation/

The Nonprofit Good Practice Guide http://www.nonprofitbasics.org/

The Nonprofit Quarterly http://www.nonprofitquarterly.org/

The Resource Alliance http://www.resource-alliance.org/

Voluntary Sector Knowledge Network http://www.vskn.ca/

September 19, 2017