To give away money is an easy matter and in any man’s power. But to decide to whom to give it and how large and when, and for what purpose and how, is neither in every man’s power nor an easy matter. (Aristotle)

My father used to say, ‘You can spend a lot of time making money. The tough time comes when you have to give it away properly.’ How to give something back, that’s the tough part in life. (Lee Iacocca)

To help another human being may sound like a very simple process. Actually it is one of the hardest things that anyone can be called to do. (Allan Keith-Lucas)

Philanthropy is commendable, but it must not cause the philanthropist to overlook the circumstances of economic injustice which make philanthropy necessary. (Dr. Martin Luther King)

Unless someone like you cares a whole awful lot, nothing is going to get better. It’s not. (Dr. Seuss)

Course Description

Americans are generous people, and, according to one scholar, it’s not that they’re generous because they’re rich—they’re rich because they’re generous (Gaudiani 2003). Philanthropy, the act of giving away money to support worthy causes, is seen as the third sector of the American economy, with billions of dollars being given away annually by individuals and philanthropic foundations to support the public good. And supporting the public good means everything from addressing pressing social problems such as homelessness and poverty to adding named dining halls to a beloved alma mater.

Giving away money—sounds easy, doesn’t it? But here’s the rub—giving away money to help others may be one of the most difficult things any of us will ever do—as an individual donating $5 or as a board member of a large foundation deciding how to distribute hundreds of thousands of dollars in the most effective way. How do we know what would “help” someone? How do we know how much money it takes to help? How can we be sure the people we’re “helping” are using the money the way we intend for them to use it? Why should there be any “strings attached” to our giving them money anyway? All of these questions and more go into giving away money to help others—no wonder it’s so hard to do! Being socially responsible requires integrating our personal values with the surrounding context of social issues (what sociologist C. Wright Mills broadly referred to as the “sociological imagination”). Taking the sociological imagination a step further, being a socially responsible philanthropist requires that we to see beyond our own values to incorporate the values and concerns of the affected community itself as we try to effectively address their personal concerns as related to their social context.
This class will give you a taste of what it means to engage in socially responsible philanthropy—and why the process of giving away money is such a difficult one. A generous gift from the Once Upon A Time Foundation will allow each of you to have the opportunity to participate as part of a team to give away money to nonprofit organizations in the New Orleans area that have committed themselves to addressing issues of concern to the area’s families and children. But before you can start to answer the questions we asked above and give away your allotted money, you first need to know some of the basics about philanthropy itself.

The primary objective of this course is to introduce you to the process of philanthropy, both intellectually and experientially. As more and more of the responsibility for the public good shift from the government to the private sector, the significance and power of individuals and foundations at the center of philanthropic giving continues to grow. It is increasingly important, therefore, that you understand this burgeoning phenomenon so that you can make educated choices about whether, or how, to participate in this process over the course of your lifetime.

To facilitate this understanding, this class is organized around two interwoven elements: one academic and the other experiential. The academic facet of the course will explore what philanthropy is, where it’s come from historically, and where it’s going in the future. We examine why people are inclined (or not inclined) to contribute—their money, their time, their expertise—to making others’ lives better. What motivates each of us to give or not brings into question our personal values and beliefs, which are often hidden in our subconscious. What motivates large foundations to give brings into question the values and beliefs, writ large, of their founders and boards of directors. What may help to motivate both us as individuals and foundations is government policy about giving—specifically, tax incentives. This leads us to think about the ethics of giving in a democracy, including the political and social power wielded by large philanthropic foundations over the civic sphere, while apparently having little accountability to those they serve.

While whetting our appetites by learning about philanthropy, what it is, what it does, we wade into the experiential dimension of the class, enabled by the generous grant from the Once Upon A Time Foundation. You will have the opportunity in this portion of the class to experience the excitement and responsibility that other giving organizations experience as they decide how to go about giving needed funding to deserving nonprofit organizations. As an integral part of a giving team, you will learn how to develop a mission statement organized around a particular social problem that resonates with your values and those of your team mates. You will also learn how to assess and compare the relative impact of one nonprofit over another based on due diligence research and site visits. As a team, you will decide how to invest your funds—which nonprofits are “more deserving” of your money than others, and how much you will need to give for them to have an impact. Here you’ll find that what you read, discuss, and hear in the “classroom” part of the course will come in very handy as you encounter the difficulties of giving away money to help others.

Required Readings


Additional readings posted to Blackboard (hereafter “B”).
Course Goals, Learning Outcomes, and Linked Assessment

The overall goals of this class are (1) to introduce students to the process of philanthropy, including its history and grounding conceptual framework; (2) to encourage students to "make visible" their taken-for-granted values and assumptions about the process of giving; (3) to allow students to exercise their "sociological imagination" in recognizing their personal values embedded in the context of surrounding social issues (4) to give students hands-on experience in socially responsible philanthropic giving; (5) to encourage students to develop effective teamwork habits; (6) to increase students' abilities to articulate, verbally and in writing, effective social arguments, and (7) to encourage students to think about how they can contribute to the public good over the course of their lifetime. In accomplishing these goals, over the course of the semester, students' knowledge and skills will be enhanced in a number of ways, congruent with the following specific objectives. By the end of the semester, students will:

(1) have a working understanding of the philanthropic process, -assessed via reflection papers, reading notes, team presentations, team briefing book, and class participation;
(2) be cognizant of their underlying values and assumptions about the process of "giving," including their stereotypes about “givers” and “receivers” of philanthropy, -assessed via Reflection Paper #1 and class participation;
(3) be able to contextualize themselves and others in a larger social structural context, illustrating the development of their sociological imagination, -assessed via reflection papers, team participation, and class participation;
(4) be able to think critically about philanthropy and strategize philanthropic giving in terms of its ability to alleviate social problems, -assessed via reflection papers, team presentations, team briefing book, and class participation;
(5) be a good team member, working with others to make decisions and resolve individual differences, -assessed via team participation and team presentations;
(6) be able to argue in favor of, or in opposition to, various philanthropic investment strategies, both in oral presentations and in written assignments, -assessed via team presentations, team briefing book, and Reflection Paper #2;
(7) be able to envision a giving plan for themselves and have sufficient initial understanding of the philanthropic process to decide the level at which they desire to participate in it, -assessed via class and team participation and Reflection Paper #2.

General Structure of the Course

The academic component of the class will include some lecture, but mostly class discussion designed to inform your approach to the experiential (“Lab”) part of the class, which will include small group work, agency site visits, and the hands-on development of a strategy for effectively distributing team funds. We will also have guest speakers from time to time, people who are working (or have worked) in philanthropy and can share their experiences with you. Because the class meets twice weekly, this bi-dimensional approach will often (but not always) be similarly structured, with one day devoted to class discussion and the other to lab “team” work.

The class has received $50,000 from the Once Upon a Time Foundation to invest in nonprofit organizations in the New Orleans area that address issues of concern to children and families. In association with Tulane’s Center for Public Service, we have developed a list of organizations, which we have grouped into five basic family/children-oriented issue areas, and around which five student teams will be developed. Each team will receive a list of nonprofits addressing that team’s particular social issue. Over the course of the semester, each team is expected to develop an argument and philanthropic plan to fund one or more of their nonprofits, based on team-developed criteria. To do so, students will participate in team discussions to establish a team mission statement, organized around a specific social problem addressed by the organizations on their list. Team members will be expected to visit their prospective grantee agencies, engage with agency personnel, and do other research as necessary to develop relevant
information needed to inform their decision making process. Additional team discussion will lead to development of a funding plan that will be presented to the class at the end of the semester. For each team meeting, a facilitator and a recorder will be assigned, on a rotating basis, to assure that discussion moves smoothly and accurate records are kept. Due to the nature of the team experience, students should expect to spend some time outside of class doing site visits and otherwise working towards development of their funding plans.

At the end of the semester, all of this work will culminate in an award-presentation party, where each team will present a “large” check to its chosen organization(s).

**Course Requirements**

**Attendance:** Students are expected to come to class (both on discussion days and lab days) fully prepared, having read, digested, and understood all assigned readings and having completed all assigned exercises beforehand. Because of the close interrelationship of the hands-on lab portion of the course with the academic portion, and the fact that each student is a vital component of their team, attendance is critical—all students are expected to attend all classes, and lapses in attendance will affect a student’s grade for the course. We will be taking attendance throughout the semester.

**Professionalism:** You will be interacting on a frequent basis with prospective grantees as you conduct site visits and gather information from them. Please remember that you are representing not only yourself and this class when you do so, but also Tulane University. During such interactions and at all times, we expect you to maintain the highest standards of professionalism, including respecting and maintaining agency confidentiality and that of their clients.

**Americans with Disabilities Act for Students with Special Needs**

“Any students with disabilities or other special needs, who need special accommodations in this course, are invited to share these concerns or requests with the instructor and contact Goldman Center for Disability Services: [http://tulane.edu/studentaffairs/disability/](http://tulane.edu/studentaffairs/disability/).”

**Code of Academic Conduct**

“The Code of Academic Conduct applies to all undergraduate students, full-time, and part-time, in Tulane University. Tulane University expects and requires behavior compatible with its high standards of scholarship. By accepting admission to the university, a student accepts its regulations (i.e., Code of Academic Conduct: [http://tulane.edu/college/code.cfm](http://tulane.edu/college/code.cfm), Code of Student Conduct: [http://tulane.edu/studentaffairs/conduct/code.cfm](http://tulane.edu/studentaffairs/conduct/code.cfm)) and acknowledges the right of the university to take disciplinary action, including suspension or expulsion, for conduct judged unsatisfactory or disruptive.”

Please ask me if you have any questions about this policy and its application to this class.

**One Wave**

Tulane University recognizes the inherent dignity of all individuals and promotes respect for all people. As “One Wave,” Tulane is committed to providing an environment free of all forms of discrimination based on race, ethnicity, creed, religion, gender, gender identity and sexual orientation, as well as all forms of sexual harassment, including sexual assault, domestic and dating violence, and stalking. If you (or someone you know) has experienced or experiences discrimination, domestic violence, sexual assault or sexual harassment, know that you are not alone. Resources and support are available. Learn more at [onewave.tulane.edu](http://onewave.tulane.edu). Any and all of your communications on these matters will be treated as either “Strictly Confidential” or “Mostly Confidential” as explained in the chart below.

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Assignments and Grading:
Assignments for the course include:
1. Submitting reading notes for all assigned readings unless otherwise noted (10%);
2. Writing two reflection papers (30% total);
3. Participating in two team-level presentations (15% total)
4. Preparation and submittal of a team “briefing book” (30%)
5. Active and thoughtful participation in class discussions (10%)
6. Active and thoughtful team participation as assessed by team members (5%)

Specifically, assignments include:

1. **Reading notes (10%)**
   This is a reading-intensive class, particularly in the early parts of the semester. Readings will provide the foundation on which you and your team will structure your “giving” plan. I expect you to come to class having read and digested all of the reading assigned for that day. For each day for which readings are assigned, unless otherwise noted, students are expected to produce reading notes covering each assigned reading. Specific guidelines for doing reading notes will be posted on Blackboard (“Guidelines” button). Reading notes will be collected and evaluated at random from part of the class two or three times during the semester, so you must always bring your three-ring binder (see below) containing your notes with you to class.

2. **Two reflection papers (30% total)**
   a) Reflection paper #1. This paper will address your current philosophy and experience of giving, drawing on times that you have donated money, or volunteered your time, to a social cause. In it, you will be expected to explore your values and beliefs about giving and what motivates you to give or refrain from giving. Guidelines will be posted on Blackboard. (10%)
   b) Reflection paper #2. This paper will give you the opportunity to wrap up and reflect on the experience of participating in the grantmaking process this semester. You will be expected to return to your earlier values, beliefs, and motivations about giving and reflect on whether (and how) the class experience has caused those beliefs to change or not. Most importantly, this paper will allow you to think about whether or not you will engage in philanthropy in the future – and, if so, how will you approach your plan for giving? I will expect you to draw from your readings over the course of the semester, and reflect on how they have affected your future engagement with philanthropy. Guidelines will be posted on Blackboard. (20%)

3. **Two team presentations (15% total)**
   a) Presentation #1 (15 minutes, including questions). This presentation is your team’s opportunity to introduce itself to the class, including your issue, your mission, and your slate of possible grantees. It is also your opportunity to get feedback from the class on how to approach your site visits. (5%)

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b) Presentation #2 (30 minutes, including questions). This presentation is your team’s opportunity to present its final funding decision to the class. The purpose is to deliver a persuasive argument to classmates, informing them of your position about what you want to do and why. (10%)  

4. Team Briefing Book (30%)  
Each team will be expected to develop a single “briefing book” that addresses how they reached their funding decision. This briefing book will essentially provide a detailed look at what you’ve done as a team over the course of the semester. Detailed guidelines, including specifications for content, will be discussed in class and posted on Blackboard. Although each team will turn in one briefing book, it should represent the effort of all team members – each team member will receive the same grade on the team briefing book UNLESS one or more members is reported by a majority of the team to be under-participating in the process. The briefing book will be turned in twice during the semester, with the first draft due October 22 and the completed final Briefing Book due December 3.  

5. Class participation and Attendance (10%)  
Students are expected to participate fully and thoughtfully in all class discussions. This means that each student must come to class prepared to discuss by having completed all reading and assignments beforehand. Please note that this portion of your grade will be affected by both attendance and participation.  

6. Team participation (5%)  
Each student is expected to be an active participant in team activities, including, among other things, discussion, site visits, decision making, and involvement in preparation of the team briefing book. Free riders are not only unconstructive in and of themselves, but they shift the burden of work to their team members. For this reason, each student will be evaluated anonymously by their respective team members on the last day of class in terms of active, constructive, and effective team participation.  

Three-Ring Binders:  
1. Each student will be expected to have a three-ring binder in which to store (1) all reading notes, (2) all written student exercises, (3) miscellaneous class notes, (4) individual notes related to your participation in team activities, and (5) any other class-related documents that become relevant over the course of the semester. Please bring this binder with you to class every day – both on discussion days and on lab days. **As explained above, I will randomly collect reading notes throughout the semester for evaluation – you MUST have these notes with you whenever I collect them or your reading note grade will suffer!**  

2. Each team will be expected to keep a (separate) three-ring binder in which to store minutes of every team session and all other team-oriented notes and documentation leading up to your funding decisions. This binder will be used to gather material from which to develop the briefing book that each team produces to submit after funding decisions have been made. Please recall that for every team session, each team will appoint a recorder to take minutes of the session—the recorder should be a different person each time.  

Course Grading Criteria:  
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<td>Reading Notes (throughout)</td>
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Week 1: What is Philanthropy?

August 25:
- Introductions and Overview of the Class (No reading due)

August 27:
- Singer, *The Life You Can Save*, pp. 3-41 (B)
- Payton & Moody, *Understanding Philanthropy*, pp. 1-26 (B)

>>> Task: For Tuesday, familiarize yourself with the website of *The Philanthropy Lab*, [https://www.thephilanthropylab.org/default.aspx](https://www.thephilanthropylab.org/default.aspx). What is its mission? Navigate around the site. Jot down some of the things that are of particular interest to you.

Week 2: Why Philanthropy? Why Give?

September 1:
- Leonhardt, “What Makes People Give?” (B)
- Singer, *The Life You Can Save*, pp. 45-62. (S)
- Tierney & Fleishman, “What are My Values and Beliefs?” (B)
- Payton & Moody, *Understanding Philanthropy*, pp. 27-95. (P&M)

Suggested:
- Frumkin, “Giving Styles.” (B)

September 3: Lab Day – Always make sure to bring your laptops to class on lab days!
- Gary, *Inspired Philanthropy*, pp. 31-44 (B)

>>> Task: Meet with your team. First, appoint someone to act as a “facilitator” – someone who will guide team deliberations for the first two lab days, and a recorder to take minutes for this week—note that you will appoint a different recorder each lab session and a different facilitator every other lab session. Get to know your teammates. What are your initial thoughts and experiences on giving? What do you believe you can add to the group process? What values and beliefs do you bring to the group? Begin to think about how you will divide up group tasks over the course of the semester.

Week 3: Why Care? What can you accomplish with this gift?

September 8:
- Shaw, “Social Justice Philanthropy: An Overview.” (B)
- Brest & Harvey, *Money Well Spent*, pp. 3-70. (B&H)
- Payton & Moody, *Understanding Philanthropy*, pp. 96-130. (P&M)
September 10: Lab Day
- Mackinnon, Amott, & McGarvey. “Mapping Change.” (B)
- W.K. Kellogg Foundation, Logic Model Development Guide, pp. 1-14 (B) (NRNN)

>>> Task: Begin researching your team’s initial slate of nonprofits. What do they do? What are their core programs? What problem(s) do they address? Drawing on these findings, begin to identify the specific problem that your team will address. Begin to think about your mission statement and theory of change.

>>> Assignment Due: Reflection Paper #1

Week 4: Ethics and Philanthropy

September 15: Guest speaker
- Reich, “A Failure of Philanthropy,” pp. 26-33. (B)
- Rhode & Packel, “Ethics and Nonprofits,” pp. 29-35. (B)
- Orosz, The Insider's Guide to Grantmaking, pp. 252-261. (B)
- Singer, The Life You Can Save, pp. 129-173. (S)
- Additional readings at discretion of guest speaker

September 17: Lab Day

>>> Task: Collectively develop a draft of your mission statement and theory of change. Post these documents to your team page on Blackboard.

Week 5: Historical Background on Giving

September 22:
- Sievers, Civil Society, Philanthropy, and the Fate of the Commons, “The Concept of Civil Society,” pp. 1-11. (B)
- Sievers, Civil Society, Philanthropy, and the Fate of the Commons, “Philanthropy, Civil Society, and the Commons,” pp. 122-144. (B)

September 24: Lab Day

>>> Task: Research the social problem that your team has decided to address. What is the history of that problem in New Orleans? What is the current extent of the problem? What efforts are currently underway to solve it? Why does this problem require your team’s attention? Why is it important?
Week 6: Prudent Giving and Due Diligence

September 29:
- Singer, *The Life You Can Save*, pp. 81-125. (S)
- La Plana Consulting, “Due Diligence Done Well: A Guide for Grantmakers.” (B)
- Brest & Harvey, *Money Well Spent*, pp. 71-85. (B&H)

October 1:

>>> Task: Whittle down your initial list of nonprofits to 4 or 5 “finalists” based on your mission statement and your theory of change. Carefully document why you decide to eliminate or keep each organization on your list. Post your list of finalists to your team blackboard page.

Week 7: Information Gathering

October 6: Information Gathering Workshop
- Readings to be announced

October 8:
- Lab Day
  - The Bridgespan Group, “How to Research a Nonprofit—Light-Touch Approach.”

>>> Task: Decide what information you will need to get from your “finalists” in order to help you make funding decisions. Develop an application for funding that you will ask your finalists to complete. Send out your funding applications to your selected finalists (they will be expecting to hear from you). Make sure to note a deadline by which they need to respond.

Week 8: Team Presentations / Fall Break

October 13:

>>> Team Presentations #1 (3 teams)

October 15:

>>> Fall Break: No Class!

Week 9: Initial Decisions

October 20:
- Lab Day

>>> Task: Review funding applications. Create a preliminary ranking of finalists. What additional information do you need to get from your finalists? Set up site visits to get that information.

October 22:
- The Bridgespan Group, “Quick Guide to Conducting a Nonprofit Site Visit.” (B) (NRNN)
- The Bridgespan Group, “Guide to Interviewing a Nonprofit’s CEO.” (B) (NRNN)
- The Bridgespan Group, “Guide to Interviewing a Nonprofit Board Member.” (B) (NRNN)

>>> Team Presentations #1 (2 teams)
Task: Prepare for site visits.

First Draft of Team Briefing Book Due

Week 10: Site Visits

October 27:
- Emerson, Fretz, & Shaw, *Writing Ethnographic Fieldnotes*, “In the Field: Participating, Observing, and Jotting Notes,” pp. 17-39. (B)

October 29:

Site visits

Week 11: Assessing the Work / Evaluating the Impact

November 3:
- Singer, “Good Charity, Bad Charity.”
- Brest, “A Decade of Outcome-Oriented Philanthropy.” (B)

November 5: Lab Day
- National Committee for Responsive Philanthropy, “Philanthropy at Its Best: Benchmarks to Assess and Enhance Grantmaker Impact.” (B) (Skim and pick out parts that are useful for your team – NRNN)

Task: Discuss and evaluate site visits. Re-rank finalists based on your due diligence, decide initial funding recommendations

Week 12: The Other Side—Seeking Grants

November 10: Guest Speaker -- TBA
- Orosz, *The Insider’s Guide to Grantmaking*, pp. 143-166. (B)
- Additional readings to be added at discretion of guest speaker

Task: Possible in-class exercise: writing a grant application

November 12: Lab Day
- The Bridgespan Group, “Donor Decision Tool.” (B) (NRNN)

Task: Final deliberations, make funding decisions. Plan for team presentations.

Week 13: Team Presentations

November 17:
- Team Presentations #2 (2 teams)
November 19:
>>> Team Presentations #2 (2 teams)

**Week 14**

November 24:
>>> Team Presentations #2 (1 team)

>>> Task: Team work on Briefing Book

November 26:
No class – **Have a Happy Thanksgiving!!**

**Week 15: Philanthropy and You**

December 1: Lab Day

>>> Task: Team work on Briefing Book

December 3: Opportunities in Philanthropy / Class Wrap-Up / Final Thoughts

>>> Final Team Briefing Book Due

**Final Exam Date**

December 11:

>>> No final exam, but Reflection Paper #2 due by noon.

**Awards Presentation**

Date and place to be announced:
This is when the fun starts – on a date and at a place to be announced sometime around the end of classes for the semester, we will have a party where awards will be presented. At that time, each team will make a brief presentation introducing their grantee organization(s), and they will award the check to a representative from that/those organizations.

~~ **Have a Wonderful Winter Break!** ~~